ERP ADMIN MANUAL

A Handbook for Administrator

Ver 02- 22 Feb 2023

Summary

This ERP system is based on ERPNEXT, and this manual is for the staff who has admin access to ERP, and guideline of ERP settings and admin management.

Table of Contents

Introduction

INTRODUCTION

Man Energy apply ERP system based on ERPNEXT which is a full-featured business management solution that helps SMEs to record all their business transactions in a single system. With this ERP, SMEs can make informed, fact-based, timely decisions to remain ahead of the competition. It serves as the backbone of a business adding strength, transparency, and control to your growing enterprise.

ERP will help you to:

1. Track all invoices and payments.
2. Know what quantity of which product is available in stock.
3. Identify and track your key performance indicators (KPIs).
4. Identify open customer queries.
5. Manage employee payroll.
6. Assign tasks and follow up on them.
7. Maintain a database of all your customers, suppliers, and contacts.
8. Prepare quotations.
9. Track your budgets and spending.
10. Determine effective selling price based on the actual raw material, machinery, and effort cost.
11. Get reminders on maintenance schedules.
12. Publish your website.

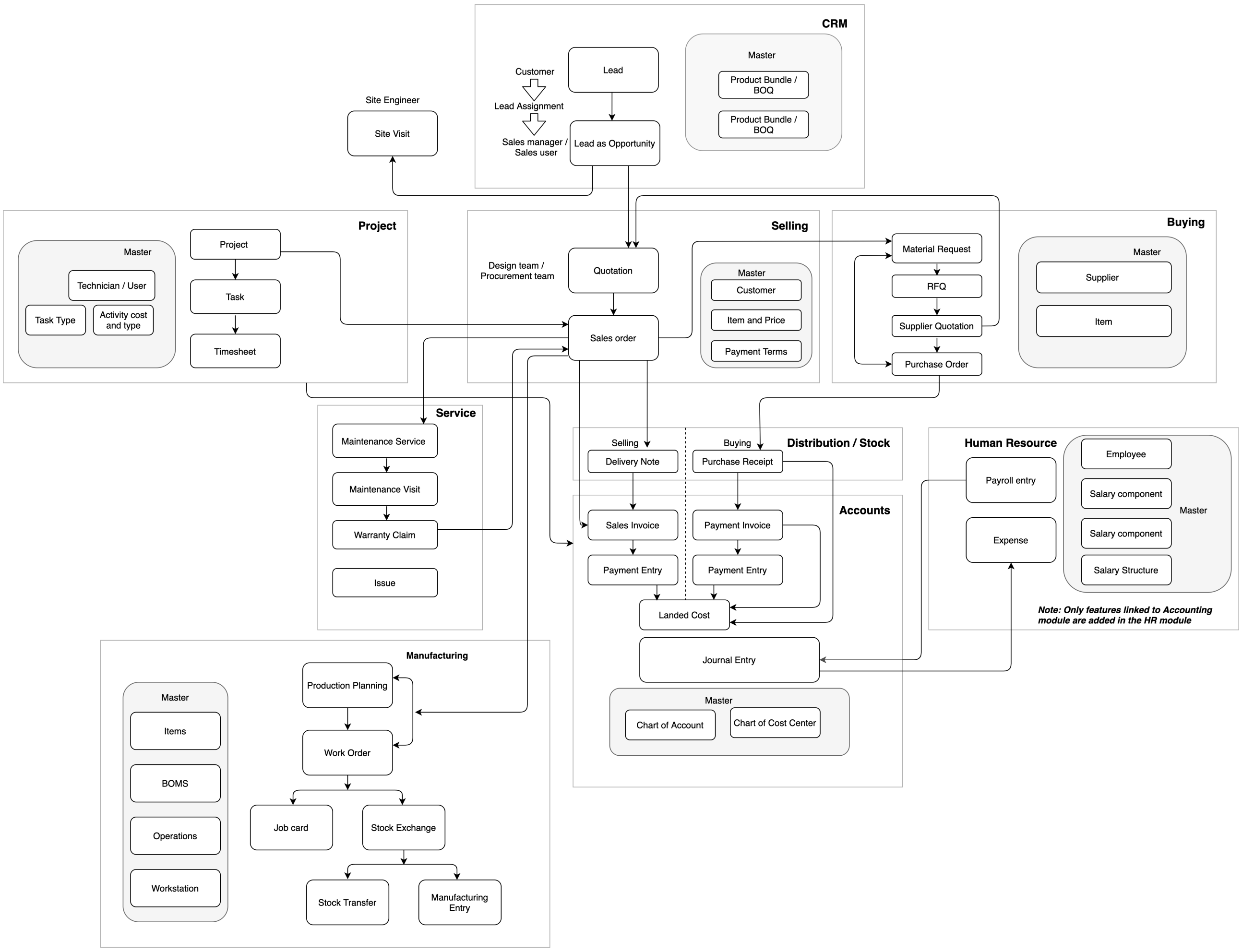
And a ton more.

Before you start managing your Operations in ERP, you must first become familiar with the system and the terms used. You should know:

- Read the Manual
- Create user account in ERP system
- Create your first Customer, Supplier and Item. Add a few more so you get familiar with them.
- Create Customer Groups, Item Groups, Warehouses, Supplier Groups, so that you can classify your Items.
- Complete a standard sales cycle - Lead > Opportunity > Quotation > Sales Order > Delivery Note > Sales Invoice > Payment (Journal Entry)
- Complete a standard purchase cycle - Material Request > Purchase Order > Purchase Receipt > Payment (Journal Entry).
- Complete a manufacturing cycle (if applicable) - BOM > Production Planning Tool > Work Order > Material Issue

FLOW CHART

Flow Chart in this ERP is very basic scenario but very important in integrating business operation with ERP system, which is as below:



CONCEPTS AND TERMS

Before you start implementation, lets get familiar with the terminology that is used and some basic concepts in ERP.

1) Basic Concepts

Company

This represents the Company records for which ERP is setup. With this same setup, you can create multiple Company records, each representing a different legal entity. The accounting for each Company will be different, but they will share the Customer, Supplier and Item records.

Setup > Company

Customer

Represents a customer. A Customer can be an individual or an organization. You can create multiple Contacts and Addresses for each Customer.

Selling > Customer

Supplier

Represents a supplier of goods or services. Your telephone company is a Supplier, so is your raw materials Supplier. Again, a Supplier can be an individual or an organization and has multiple Contacts and Addresses.

Buying > Supplier

Item

A Product, sub-product or Service that is either bought, sold or manufactured and is uniquely identified.

Stock > Item

Account

An Account is a heading under which financial and business transactions are carried on. Examples of accounts are "Debtors", "Creditors", "VAT Payable", "Travel Expenses" , "Sales", "Share Capital", etc. ERP keeps track of your customers' and suppliers' balances in the background, so you don't need to create dedicated Accounts for them.

Accounting > Chart of Accounts

Address

An address represents location details of a customer or Supplier. These can be of different locations such as Head Office, Factory, Warehouse, Shop etc.

Selling > Address

Contact

An individual Contact belongs to a customer or Supplier or is just an independent. A Contact has a name and contact details like email and phone number.

Selling > Contact

Communication

A list of all Communication with a Contact or Lead. All emails sent from the system are added to the Communication table.

Support > Communication

Price List

A Price List is a place where different rate plans can be stored. It's a name you give to a set of Item Prices stored under a particular List.

Selling > Price List

Buying > Price List

2) Accounting

Fiscal Year

Represents a Financial Year or Accounting Year. You can operate multiple Fiscal Years at the same time. Each Fiscal Year has a start date and an end date and transactions can only be recorded in this period. When you "close" a fiscal year, it's balances are transferred as "opening" balances for the next fiscal year.

Setup > Company > Fiscal Year

Cost Center

A Cost Center is like an Account, but the only difference is that its structure represents your business more closely than Accounts. For example, in your Chart of Accounts, you can separate your expenses by its type (i.e., travel, marketing, etc.). In your Chart of Cost Centers, you can separate them by product line or business group (e.g., online sales, retail sales, etc.).

Accounting > Chart of Cost Centers

Journal Entry

A document that contains General Ledger (GL) entries and the sum of Debits and Credits of those entries is the same. In ERP you can update Payments, Returns, etc., using Journal Entries.

Accounting > Journal Entry

Sales Invoice

A bill sent to Customers for delivery of Items (goods or services).

Accounting > Sales Invoice

Purchase Invoice

A bill sent by a Supplier for delivery of Items (goods or services).

Accounting > Purchase Invoice

Currency

ERP allows you to book transactions in multiple currencies. There is only one currency for your book of accounts though. While posting your Invoices with payments in different currencies, the amount is converted to the default currency by the specified conversion rate.

Setup > Currency

---

3) Selling

Customer Group

A classification of Customers, usually based on market segment.

Selling > Setup > Customer Group

Lead

A person who could be a future source of business. A Lead may generate Opportunities. (from: "may lead to a sale").

CRM > Lead

Opportunity

A potential sale. (from: "opportunity for a business").

CRM > Opportunity

Quotation

Customer's request to price an item or service.

Selling > Quotation

Sales Order

A note confirming the terms of delivery and price of an Item (product or service) by the Customer. Deliveries, Work Orders and Invoices are made on basis of Sales Orders.

Selling > Sales Order

Territory

A geographical area classification for sales management. You can set targets for Territories and each sale is linked to a Territory.

Selling > Setup > Territory

Sales Partner

A third-party distributor / dealer / affiliate / commission agent who sells the company' s products usually for a commission.

Selling > Setup > Sales Partner

Sales Person

Someone who pitches to the Customer and closes deals. You can set targets for Sales Persons and tag them in transactions.

Selling > Setup > Sales Person

---

4) Buying

Purchase Order

A contract given to a Supplier to deliver the specified Items at the specified cost, quantity, dates and other terms.

Buying > Purchase Order

Material Request

A request made by a system User, or automatically generated by ERP based on reorder level or projected quantity in Production Plan for purchasing a set of Items.

Buying > Material Request

Stock (Inventory)

Warehouse

A logical Warehouse against which stock entries are made.

Stock > Warehouse

Stock Entry

Material transfer from a Warehouse, to a Warehouse or from one Warehouse to another.

Stock > Stock Entry

Delivery Note

A list of Items with quantities for shipment. A Delivery Note will reduce the stock of Items for the Warehouse from where you ship. A Delivery Note is usually made against a Sales Order.

Stock > Delivery Note

Purchase Receipt

A note stating that a particular set of Items were received from the Supplier, most likely against a Purchase Order.

Stock > Purchase Receipt

Serial Number

A unique number given to a particular unit of an Item.

Stock > Serial Number

Batch

A number given to a group of units of a particular Item that may be purchased or manufactured in a group.

Stock > Batch

Stock Ledger Entry

A unified table for all material movement from one warehouse to another. This is the table that is updated when a Stock Entry, Delivery Note, Purchase Receipt, and Sales Invoice (POS) is made.

Stock Reconciliation

Update Stock of multiple Items from a spreadsheet (CSV) file.

Stock > Stock Reconciliation

Quality Inspection

A note prepared to record certain parameters of an Item at the time of Receipt from Supplier, or Delivery to Customer.

Stock > Quality Inspection

Item Group

A classification of Item.

Stock > Setup > Item Group

Human Resource Management

Employee

Record of a person who has been in present or past, in the employment of the company.

Human Resources > Employee

Leave Application

A record of an approved or rejected request for leave.

Human Resource > Leave Application

Leave Type

A type of leave (e.g., Sick Leave, Maternity Leave, etc.).

Human Resource > Leave and Attendance > Leave Type

Payroll Entry

A tool that helps in creation of multiple Salary Slips for Employees.

Human Resource > Payroll Entry

Salary Slip

A record of the monthly salary given to an Employee.

Human Resource > Salary Slip

Salary Structure

A template identifying all the components of an Employees' salary (earnings), tax and other social security deductions.

Human Resource > Salary and Payroll > Salary Structure

Appraisal

A record of the performance of an Employee over a specified period based on certain parameters.

Human Resources > Appraisal

Appraisal Template

A template recording the different parameters of an Employees' performance and their weightage for a particular role.

Human Resources > Employee Setup > Appraisal Template

Attendance

A record indicating presence or absence of an Employee on a particular day.

Human Resources > Attendance

---

5) Manufacturing

Bill of Materials (BOM)

A list of Operations and Items with their quantities, that are required to produce another Item. A Bill of Materials (BOM) is used to plan purchases and do product costing.

Manufacturing > BOM

Workstation

A place where a BOM operation takes place. It is useful to calculate the direct cost of the product.

Manufacturing > Workstation

Work Order

A document signaling production (manufacture) of a particular Item with specified quantities.

Manufacturing > Work Order

Production Planning Tool

A tool for automatic creation of Work Orders and Purchase Requests based on Open Sales Orders in a given period.

Manufacturing > Production Planning Tool

---

6) Website

Blog Post

A short article that appears in the "Blog" section of the website generated from the ERP website module. Blog is a short form of "Web Log".

Website > Blog Post

Web Page

A web page with a unique URL (web address) on the website generated from ERP.

Website > Web Page

---

7) Setup / Customization

Custom Field

A user defined field on a form / table.

Setup > Customize ERP > Custom Field

Global Defaults

This is the section where you set default values for various parameters of the system.

Setup > Data > Global Defaults

Print Heading

A title that can be set on a transaction just for printing. For example, you want to print a Quotation with a title "Proposal" or "Pro forma Invoice".

Setup > Branding and Printing > Print Headings

Terms and Conditions

Text of your terms of contract. In Sales/Purchase transactions there might be certain Terms and Conditions based on which the Supplier provides goods or services to the Customer. You can apply the Terms and Conditions to transactions and they will appear when printing the document. To know about Terms and Conditions, click here

Selling > Setup > Terms and Conditions

Unit of Measure (UOM)

How quantity is measured for an Item. E.g., Kg, No., Pair, Packet, etc.

Stock > Setup > UOM

Setting Up

<u>BASIC SETUP</u>

➢ Company Setup

A company is a legal entity made up of an association of people carrying on a commercial or industrial enterprise.

In ERP, the first Company is created when an ERP account is set up. For each Company, you can set a domain as manufacturing, retail, or services depending on the nature of your business activity.

If you have more than one company, you can add them from:

Home > Accounting > Company

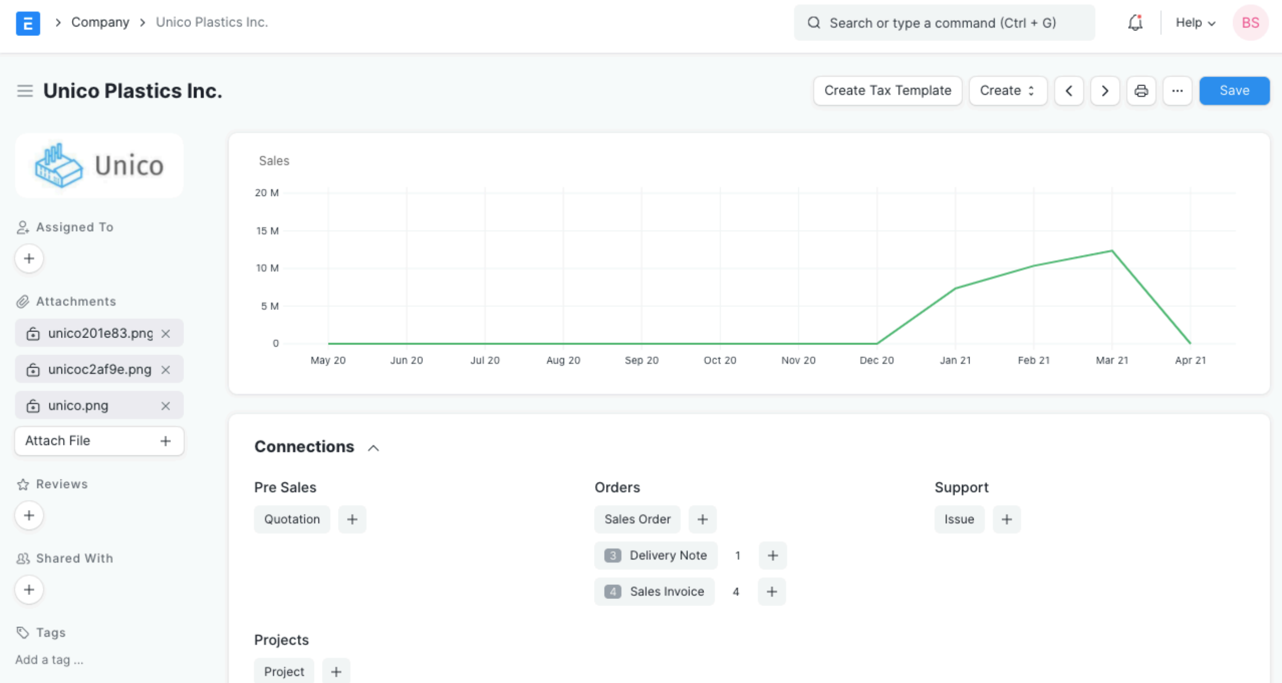
1. How to create a new Company

1. Go to the Company list, click on New.
2. Enter the name, abbreviation, and default currency for the company.
3. Save.

The abbreviation for your company is created by default. For example, FT for Frappe Technologies. The abbreviation helps differentiate the assets of one company from another.

The abbreviation also appears in various accounts, cost centers, taxes templates, warehouse, etc, of your company.

You can also attach a company logo and add a description for the company.



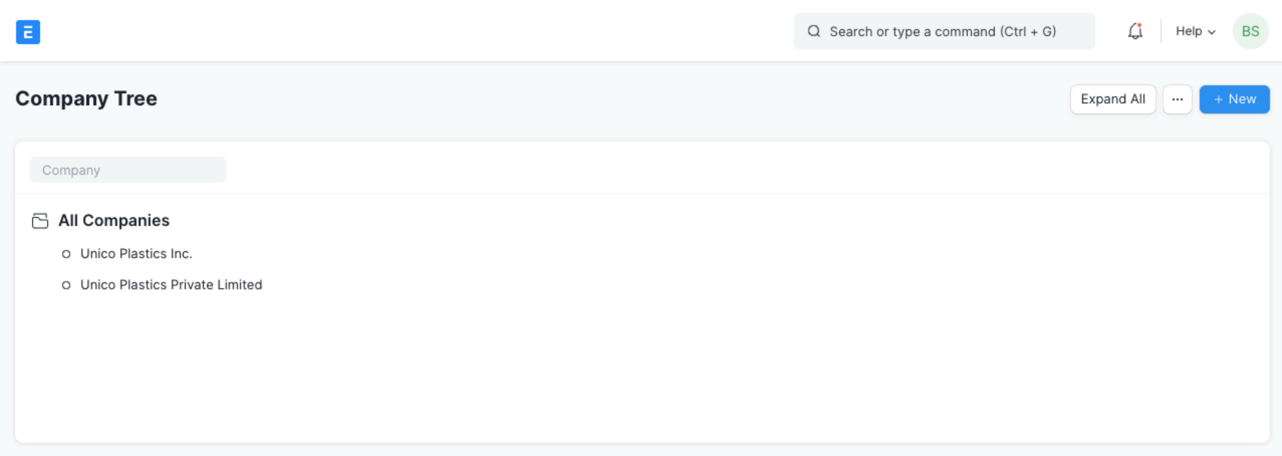
<u>1.1 Multi-Company Structure</u>

Let's assume you run a group of companies, some may be larger companies and some may be smaller that are a part of the larger company(s).

In ERP, you can set up multiple companies. The company structure can be parallel, i.e., sister companies, parent-child companies, or a combination of both.

A parent company is a larger organization which consists of one or more child companies. A child company is a subsidiary of a parent company.

The company tree view displays the overall structure of your company.



Once you build a company tree, ERP will validate if the accounts of the child companies match the accounts in the parent company. All the accounts can be combined in a consolidated chart of accounts statements.

1.2 Other Options when Creating a Company

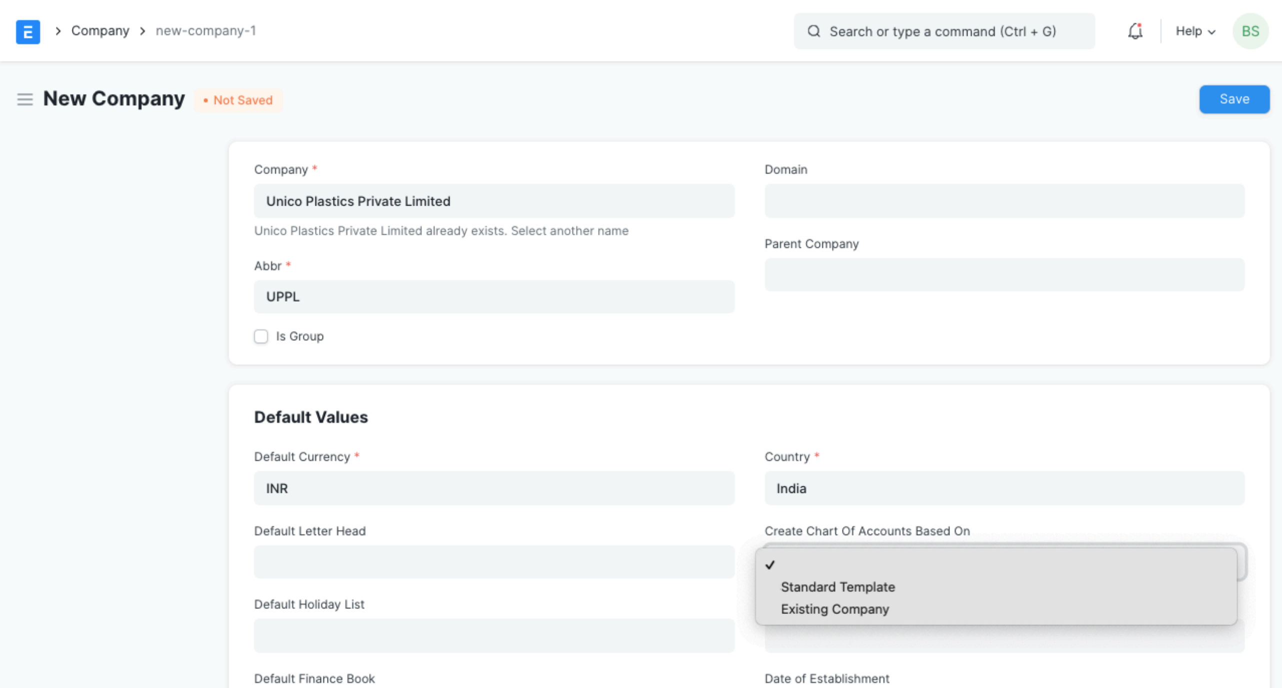
- Domain: The domain of work the company is into. Eg: manufacturing, services, etc. Choose one when setting up your account.
- Is Group: If checked, this becomes a parent company.
- Parent Company: If this is a child company, set the parent from this field i.e., select a group company this company belongs to. If a parent company is set, the chart of accounts for the new company you're creating will be created based on the selected parent company.

1.3 Chart of Accounts

For each Company, the master for Chart of Accounts is maintained separately. This allows you to maintain separate accounting for each company as per the legal requirements. You can also import chart of accounts using the [Charts Of Accounts Importer](#).

ERP has localized Chart of Accounts readily available for some countries. When creating a new Company, you can choose to set up the Chart of Account from one of the following options.

- Standard Chart of Accounts
- Based on Existing Company's Chart of Account



Note that, if the Parent Company is selected when creating a new Company, the Chart of Accounts will be created based on the existing Parent Company.

1.4 Defaults

Within the Company master, you can set many of the default values for masters and accounts. These default accounts will help you quickly post accounting transactions, where the value for the account will be fetched from the Company master if provided. As soon as the company is created, a default Chart Of Accounts and Cost Center is automatically created.

The following defaults can be set for a company:

- Default Letter Head
- Default Holiday List
- Standard Working Hours
- Default Terms and Conditions
- Country
- Tax ID
- Date of Establishment

2. Features

2.1 Monthly Sales Target

Set the monthly sales target number in the company currency, for example, $10,000. Total monthly sales will be visible once transactions are made. To know more, click here.

2.2 Account Settings

Some of the following accounts will be set by default when you create a new company, others can be created. The accounts can be seen in the Chart of Accounts. These values can be changed later on if needed.

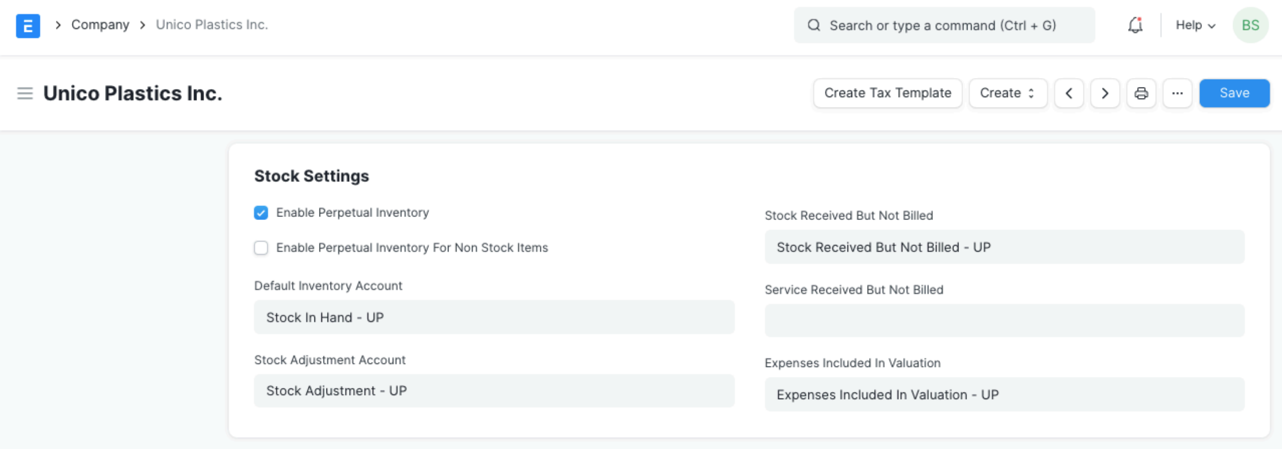
- Default Bank Account
- Default Cash Account
- Default Receivable Account
- Round Off Account
- Round Off Cost Center
- Write Off Account
- Discount Allowed Account
- Discount Received Account
- Exchange Gain / Loss Account
- Unrealized Exchange Gain/Loss Account
- Default Payable Account
- Default Employee Advance Account
- Default Cost of Goods Sold Account
- Default Income Account
- Default Deferred Revenue Account
- Default Deferred Expense Account
- Default Payroll Payable Account
- Default Expense Claim Payable Account
- Default Cost Center
- Credit Limit
- Default Payment Terms Template

2.3 Stock Settings

The perpetual Inventory feature would lead to Stock transactions impacting the company's books of accounts. Know more here. It is enabled by default.

- Default Inventory Account

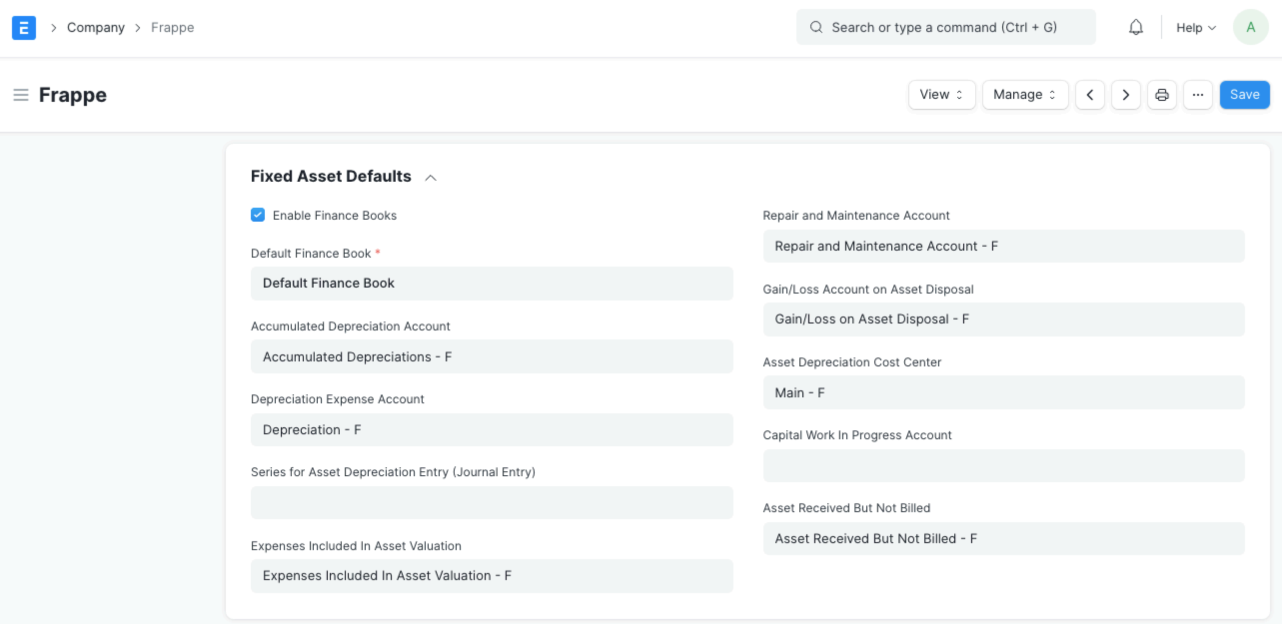
- Stock Adjustment Account
- Stock Received But Not Billed
- Expenses Included In Valuation



2.4 Fixed Asset Defaults

For managing fixed assets in a company, the following accounts are needed. Most of them will be created by default. They can be seen in the Chart of Accounts.

- Accumulated Depreciation Account
- Depreciation Expense Account
- Series for Asset Depreciation Entry (Journal Entry)
- Expenses Included In Asset Valuation
- Gain/Loss Account on Asset Disposal
- Asset Depreciation Cost Center
- Capital Work In Progress Account
- Asset Received But Not Billed



If you wish to book your accounting entries against different Finance Books, check the Enable Finance Books box and set a Default Finance Book.

2.5 HRA Settings

Set the default Component for the following Salary Components.

For the UAE user, setting the default value in this section will help in Employee Tax Declaration calculations, especially for HRA exemption amount.

- Basic Component
- HRA Component
- Arrear Component

2.6 Bank Remittance Settings

Using the Payment Order feature (in Accounts), you can give a single document of transfer for multiple bank transfers. Updating the value in the following fields will help you generate Bank Remittance in a format which can be accepted and uploaded on the bank's portal.

A payment order allows a user to combine several payment entries/payment requests into a single document. Bank Remittance allows a user to send that single document to the bank as text format, this text format can be manually uploaded to Kotak bank payments platform.

Client Code and Product Code are codes given by the bank to you. This is required to be added in the text file as per the format specified by Kotak bank.

2.7 Budget

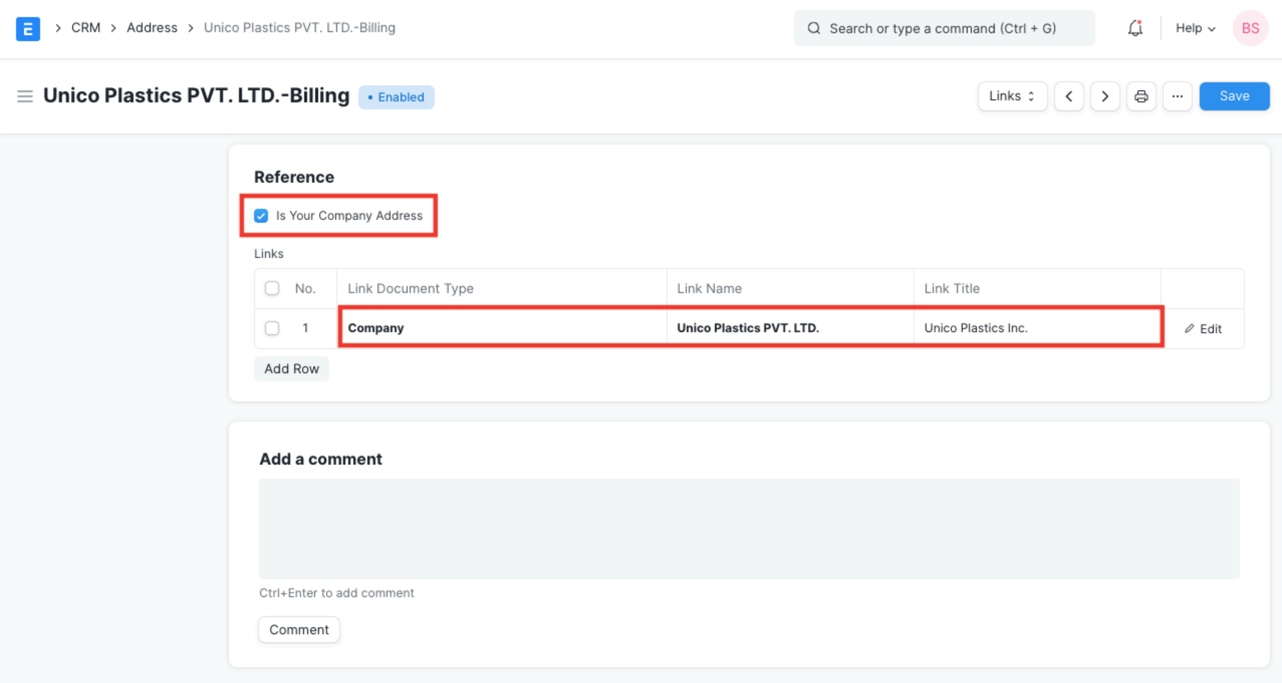
Exception Budget Approver Role: The role selected here can bypass the set budget to approve expenses.

2.8 Company Info

For reference, the following details of your company can be saved in ERP:

- Date of Incorporation
- Phone No
- Fax
- Email
- Website
- Address
- Registration Details

Note: When setting the address here, it is important to tick the 'Is Your Company Address' checkbox.



2.9 Deleting all Company Transactions

You can delete all transactions (Orders, Invoices) of a Company. *Use with caution*, transactions once deleted cannot be recovered.

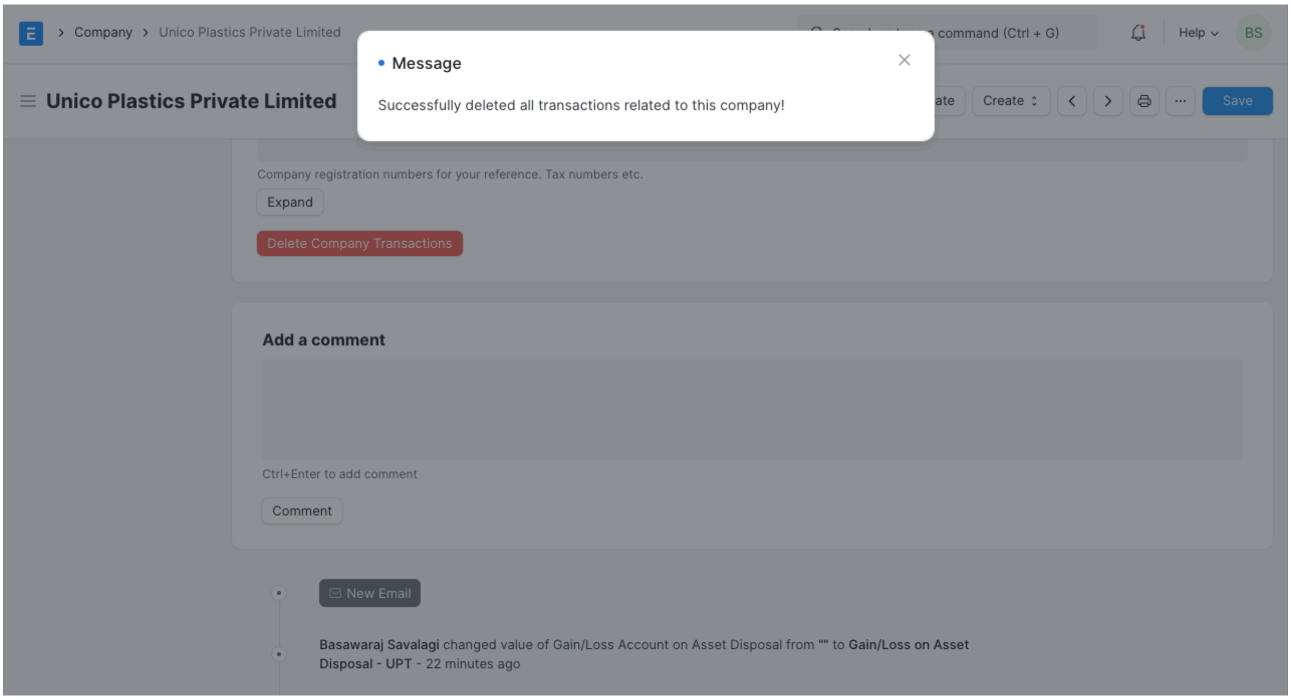
Requirements

- The User has to be a System Manager

- The User has to be the creator of the Company

Steps

1. Click on the Delete Transactions button under Manage
2. Verify your password
3. Enter Company name for confirmation



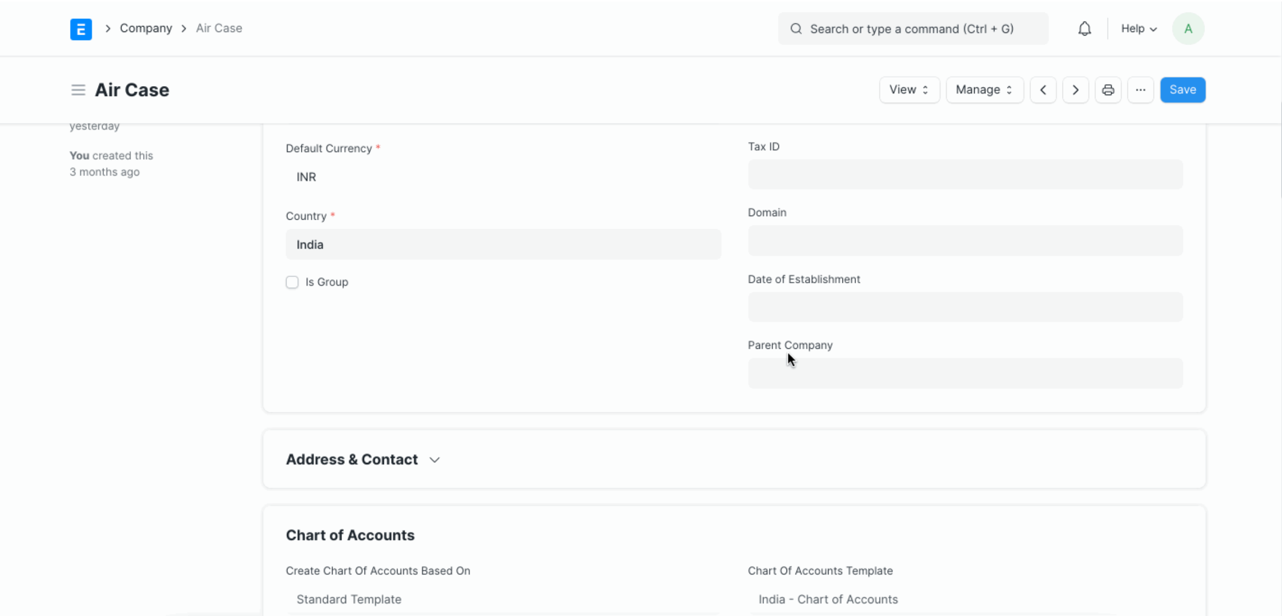
And you're done. The master data like Item, Account, Employee, BOM etc. will remain as it is.

What is affected?

- Sales/Purchase Orders/Invoices Receipts/Notes will be deleted.
- The monthly sales and sales history will be cleared.
- All notifications will be cleared.
- Lead Addresses to which the Company is linked will be deleted.
- All communications linked to the Company will be deleted.
- All naming series will be reset.
- Stock Entries linked to a Warehouse of this Company will be deleted.

2.10 Change Parent Company

You can change the Parent Company of an existing company. Go to the Parent Company field, select the Company from the list, and save the form.



➢ Setting Up Taxes

Taxes are compulsory contributions to the state/country revenue.

One of the primary motivators for compulsory use of accounting tools is the calculation of taxes. ERP allows you to make configurable tax templates that you can apply to your sales or purchase transactions.

1. Tax Accounts

For Tax Accounts that you want to use in the tax templates, go to:

Home > Accounting > Chart of Accounts

Select an account and click on edit. Select the 'Account Type' as 'Tax' for the account.

2. Sales Taxes and Charges Template

Sales Taxes and Charges Template fetched taxes for your sales transactions like Sales Order and Sales Invoice. Read Sales Taxes and Charges Template to know more.

3. Purchase Taxes and Charges Template

Purchase Taxes and Charges Template fetched taxes for your sales transactions like Purchase Order and Purchase Invoice. Read Purchase Taxes and Charges Template to know more.

4. Item Tax Template

The tax set in Item Tax Template applies specifically to an Item or an Item Group. It is given preference over the Sales/Purchase Tax Template. Read Item Tax Template to know more.

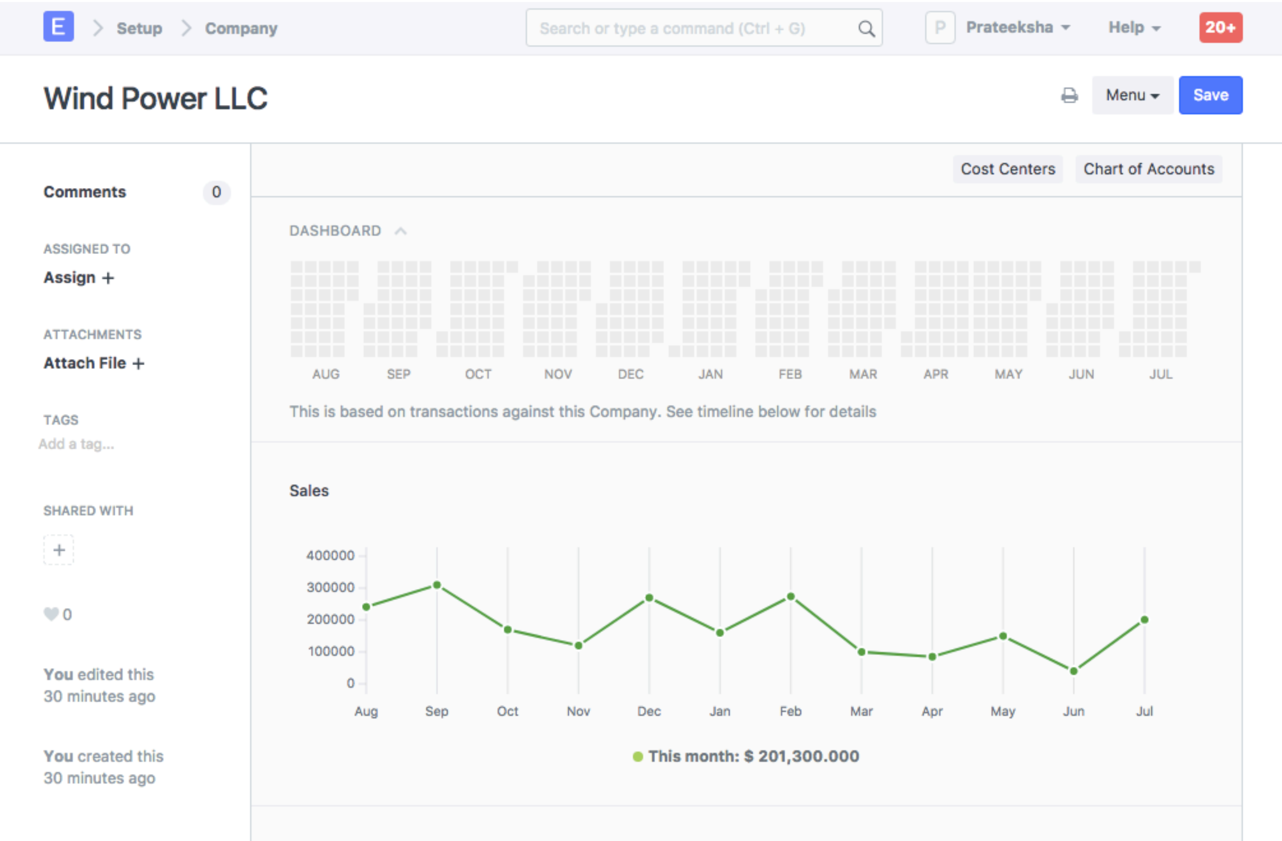
5. Tax Category

Tax category helps in automatically applying sales/purchase tax templates in your transactions based on the customer/supplier chosen. Read Tax Category to know more.

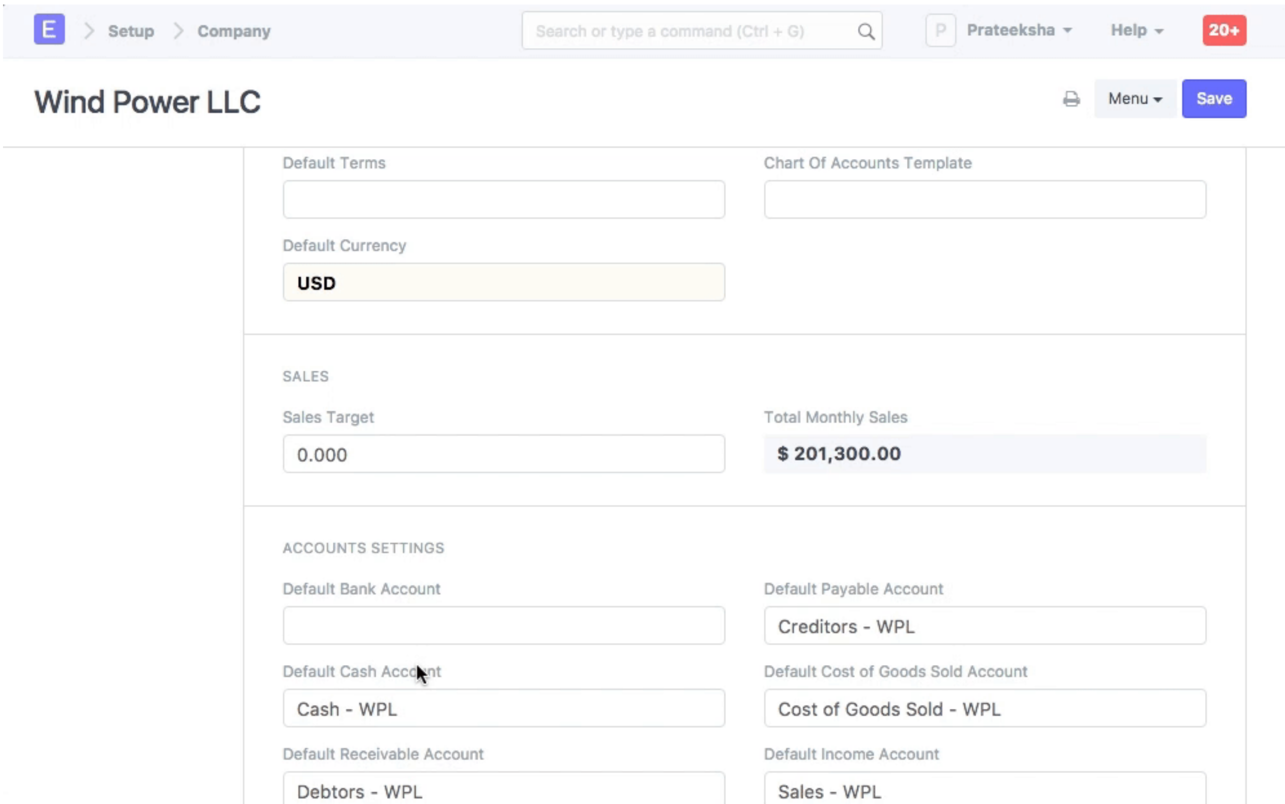
➢ Setting Company Sales Goal

Defining and achieving sales goals/targets can help your company reach new goals and increase revenue.

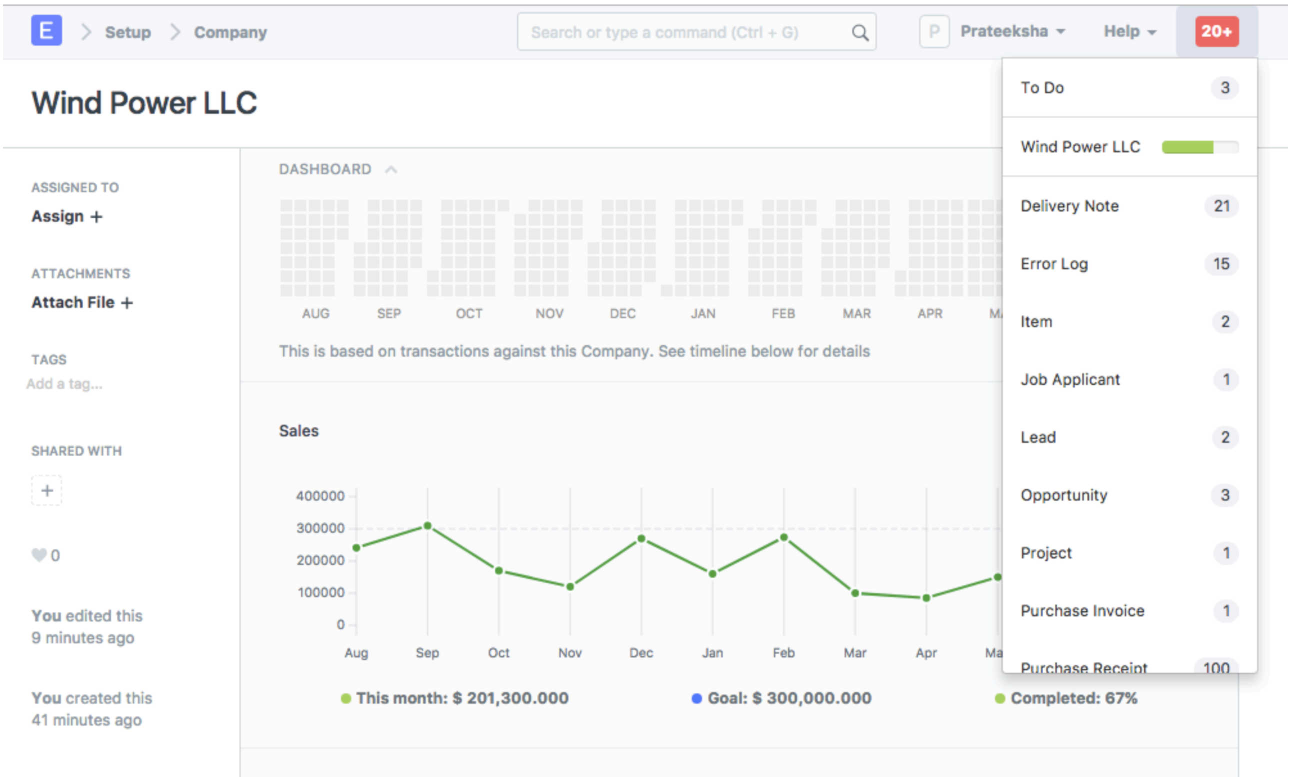
1. Monthly sales targets can be set for a Company via the Company master under the Sales Settings section. By default, the Company master dashboard displays month-wise past sales stats.



2. You can set the **Sales Target** field to track progress against the graph:



3. The target progress is also shown in notifications:



Global Defaults

Default values for documents like Currency, Fiscal Year, etc, can be set from Global Defaults.

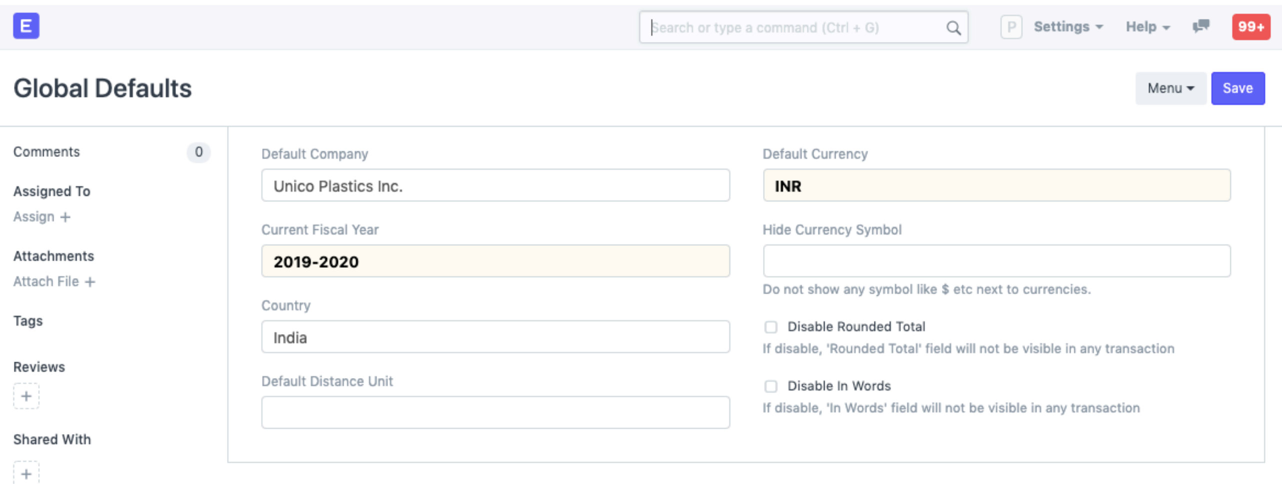
The values set here will impact all users and the default values for various fields will be set for them.

To access Global Defaults, go to:

Home > Settings > Global Defaults

Or search from the search bar.

Whenever a new document is created, these values will be set as default.



- Default Company
- Current Fiscal Year
- Country
- Default Distance Unit
- Default Currency

- Hide Currency Symbol
- Disable Rounded Total
- Disable In Words

The Default Distance Unit is used to calculate the total distance in [Delivery Trips](#).

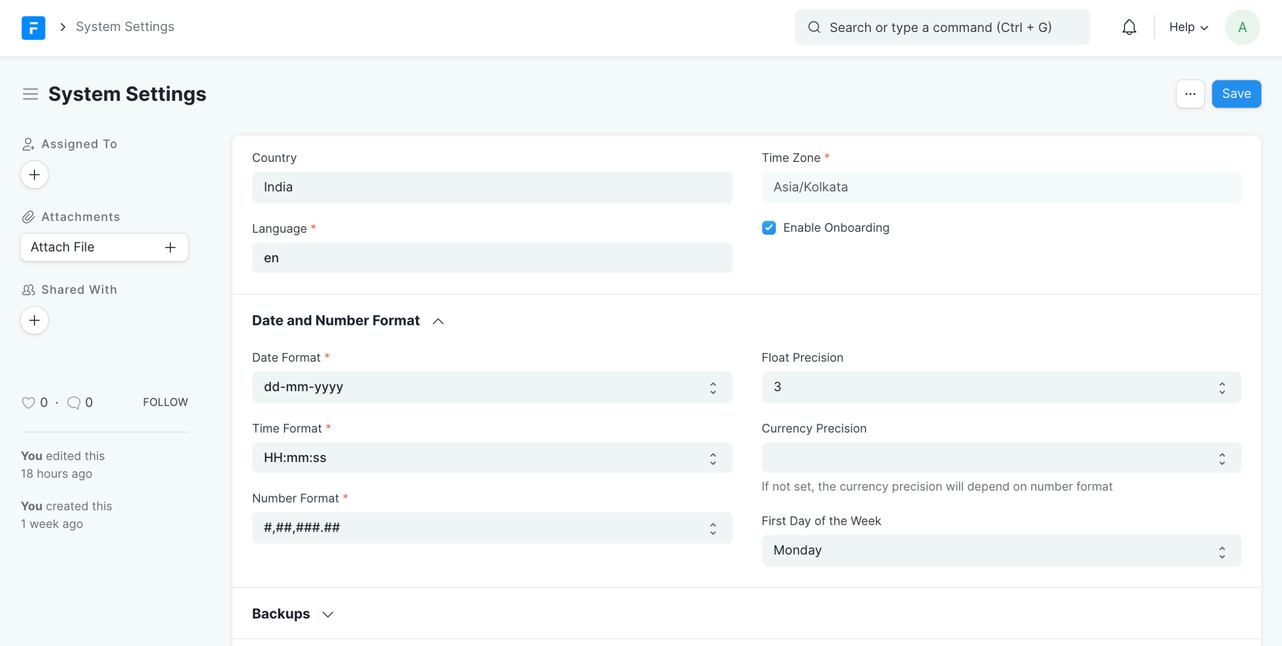
➢ System Settings

System Setting contains settings for system-wide configuration of the account.

You can localize ERP to use particular timezone, date, number or currency format, and also set global session expiry via System Settings.

To open System Settings, go to:

Home > Settings > System Settings



1. Sections in System Settings

1.1 General

- **Country**: You can set the default country here, this will be fetched when creating new addresses. If your company has multiple branches in different countries, choose the head office location.
- **Time Zone**: Sets time automatically based on the time zone.
- **Language**: Sets the global language for the ERP account. Then language will be changed in all the menus, transactions, masters, etc.

1.2 Date and Number Format

- **Date Format**: Format in which dates will be displayed. For e.g., dd.mm.yyyy or mm/dd/yyyy. This depends on how dates are formatted in your region.
- **Time Format**: Format in which time will be displayed. You can choose to show (HH:mm:ss) or hide seconds by setting the option as (HH:mm) .
- **Number Format**: Format in which numbers will be formatted. For e.g., 1,000 or 1000.00.
- **Float Precision**: The number of zeros displayed after the decimal point for quantities etc. The range is 2-9. Default is 3.
- **Currency Precision**: Number of zeros displayed after the decimal point for currency values. If left blank, it will be based on the **Number Format**.
- **First Day of the Week**: This can be used to configure the day for start of the week. This affects dynamic filters for week used in list and report views, date seletion layout and calendar view.

1.3 Backups

In ERP you can backup the database as well as your files. Database backups are created automatically while file backups need to be downloaded explicitly.

This field shows the number of backups after which older ones will be deleted. By default, 3 backups are saved over 24 hours. New backups are automatically created every few hours and the newest backup will overwrite the oldest one. For a backup of files, click on the Download Files Backup button in the Download Backups form.

Keeping regular backups of your system is a good practice in case of any mishap and you want to roll back or just for your records.

1.4 Permissions

Using permissions, you can limit user access to document types. The limitation can be based on fields like Company, Territory, Branch, etc. To know more about User Permissions, click here.

If Apply Strict User Permissions checkbox is ticked and User Permission is defined for a DocType for a User, then all the documents where the value of the link is **blank**, will not be shown to that User.

This is done from:

Home > Users and Permissions > Permissions > User Permissions

For example: If you set User Permissions for Territory and set the value as UAE. If the checkbox is unticked, all transactions (sales orders, quotations) with UAE and **blank** will be shown to the users.

If the Apply Strict User Permissions checkbox is ticked, documents, where Territory is blank, will not be shown to the users.

1.5 Security

- **Session Expiry**: Number of idle hours after which you'll be logged out of a session. This helps in better security. For example, if there is no activity for 6 hours, your account will be logged out.
- **Session Expiry Mobile**: Session expiry when logged in from a mobile phone.
- **Document Share Key Expiry (in Days)**: Number of days after which "document web link" sent via email will be expired.
- **Allow only one session per user**: If you want to use a single set of credentials for multiple users, tick this checkbox. The number of simultaneous sessions can be changed under User master. Mobile phone sessions are not counted here.
- **Allow Login using Mobile Number**: By checking the 'Allow Login using Mobile Number' checkbox, you can log in to ERP using a valid mobile number set in your User account.
- **Allow Login using User Name**: Allow user login via their username set in the User master.
- **Show Full Error and Allow Reporting of Issues to the Developer**: This will display the whole error on the screen and allow reporting issues. If you have technical knowledge in this area, you can get a better idea of the error by reading the whole message.
- **Remove EXIF tags from uploaded images**: Metadata stored in image files in the EXIF file format can be exploited to get sensitive user information. This option lets users remove that data from the images before uploading.
- **Allow Older Web View Links (Insecure)**: The configuration that allows web links with no expiry. Note: Older web links (generated in v13) are considered to be insecure as they had no expiry. It is recommended to keep this configuration unchecked.

1.6 Password

- **Force User to Reset Password**: Number of days after which a password reset is mandatory. 0 means no limit.
- **Enable Password Policy**: Enables a password strength checker so that users have to use strong passwords for their login.
- **Minimum Password Score**: Score for the password strength checker
    - 2 is medium
    - 3 is strong
    - 4 is very strong

The complexity is based on the number of characters, capitalization, special characters, etc.

- **Reset Password Link Expiry Duration**: This configuration is used to set the duration after which the newly created reset rassword link gets expired. The default expiry for reset password link is 20 minutes. Setting it to "0 Seconds" disables the "Reset Password Link Expiry" functionality.

- **Password Reset Link Generation Limit**: Using this configuration the limit for number of password reset requests per hour can be set. The default limit is 3. Setting it to 0 will allow unlimited password reset link generation requests.

1.7 Brute Force Security

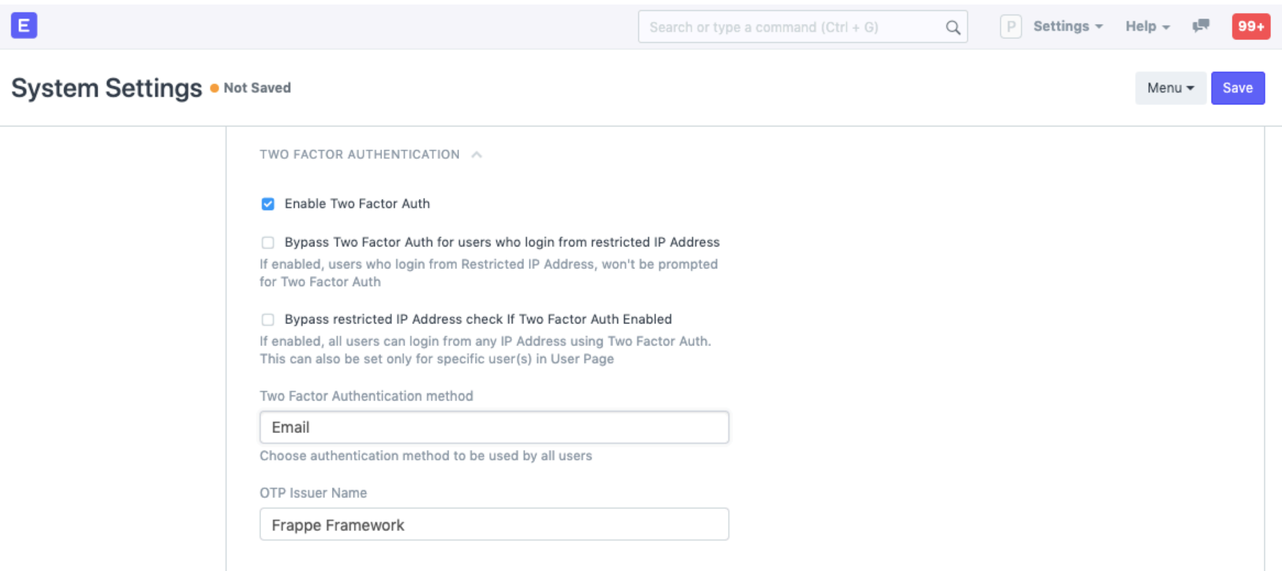
- **Allow Consecutive Login Attempts**: Consecutive logins after which you'll be locked out of the account for a specific period. This helps if an intruder tries to log in to your account.
- **Allow Login After Fail**: Seconds after which a login attempt will be allowed after consecutive unsuccessful attempts.

1.8 Two Factor Authentication

Settings for Two Factor Authentication can be configured here.

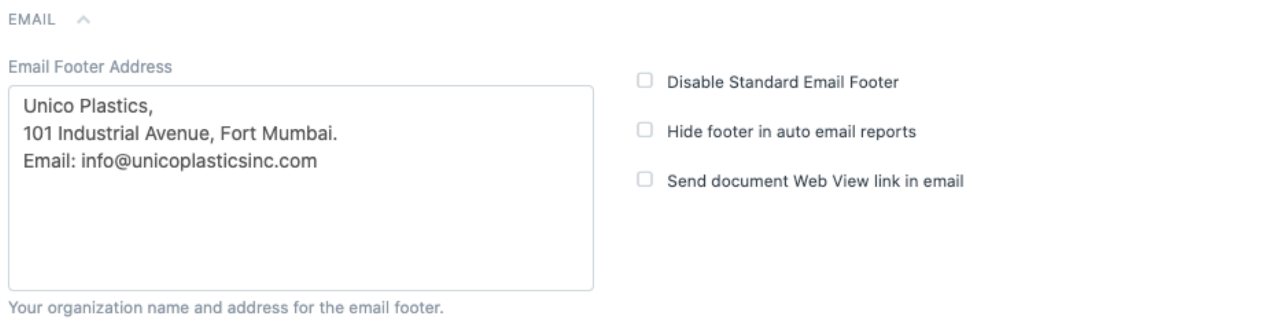
On ticking 'Enable Two Factor Auth', the following two options will be seen.

- **Bypass Two Factor Auth for users who log in from restricted IP Address**: Users who log in from restricted IP addresses will not be asked for Two Factor Authentication. You can restrict IPs from User master under the Restrict IP field.
- **Bypass restricted IP Address check If Two Factor Auth Enabled**: If checked, all users can log in with Two Factor Authentication regardless if their IP is restricted or not.
- **Two Factor Authentication method**: Select the authentication method to be used - OTP App, SMS, or email.
- **Expiry time of QR Code Image Page**: Expiry time for QRCode image if "OTP App" is selected in the method.
- OTP Issuer Name of the One Time Password.



1.9 Email

- **Email Footer Address**: Organization name, address, and other details can be added here. This will be set as default in all outgoing mails.
- **Disable Standard Email Footer**: If ticked, the standard email footer will be disabled for outgoing emails.
- **Hide footer in auto-email reports**: If ticked, footers will be hidden in Auto Email reports.
- **Send document web view link in the email**: ERP has a portal view available from where parties like Customers and Suppliers can sign up and view their order history. When you email a transaction to your party, you can also send a web link to view the same document on the portal of your ERP account. This option will enable this functionality.



1.10 Chat

- **Enable Chat**: This option will enable the in-app chat which can be used to communicate with other employees.

1.10 System Updates

- **Disable System Update Notfication**: This option disables all version update notfications triggered by the application.

➢ Letter Head

A Letter Head contains your organization's name, logo, address, etc which appears at the top portion in documents.

Every company has a default Letter Head. These Letter Head values are generally set as Header and Footer in the documents. In ERP, you can capture these details in the Letter Head master.

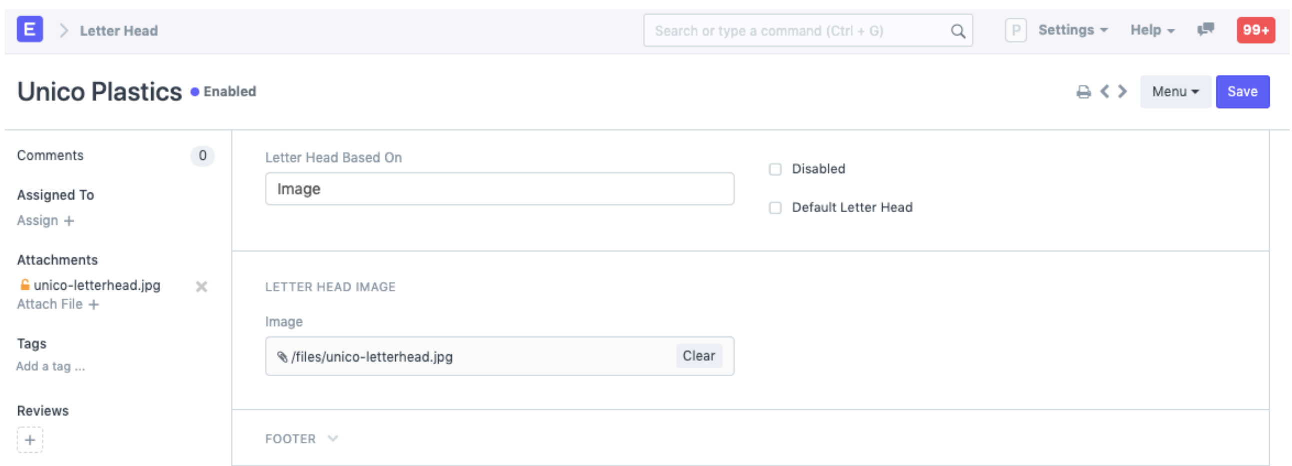
These details will appear in the Print Format of transactions like Sales Order, Sales Invoice, Salary Slip, Purchase Order, etc. In ERP, the Letter Head is only for setting up the top part of the document, other content is pre-formatted and can be configured via Print Format and Print Headings.

To access Letter Head, go to:

Home > Settings > Letter Head

1. How to create a Letter Head

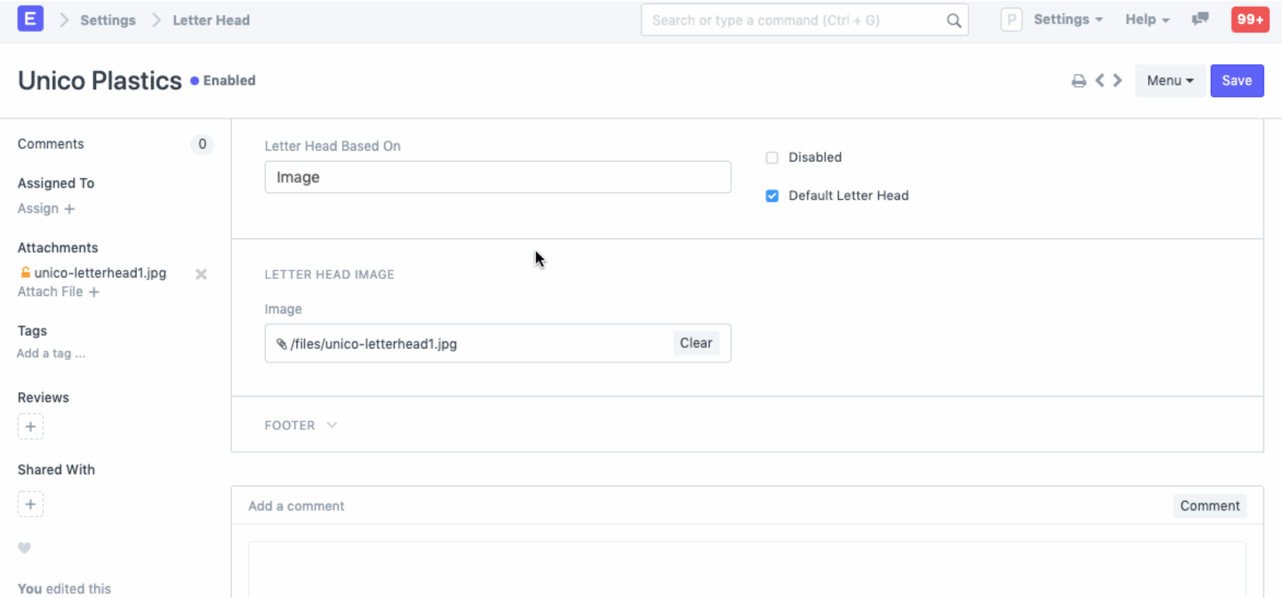
1. Go to the Letter Head list, click on New.
2. Enter a name for the Letter Head. You can create a separate Letter Head for different office locations.
3. Choose whether based on image or HTML.
4. You can enter details in a Letter Head by using:
    - Logo Image: Click on the Attach button to attach an image. Once the image is inserted, HTML for it will be generated automatically.
    - Other information (like Address, tax ID, etc.) that you want to put on your Letter Head.



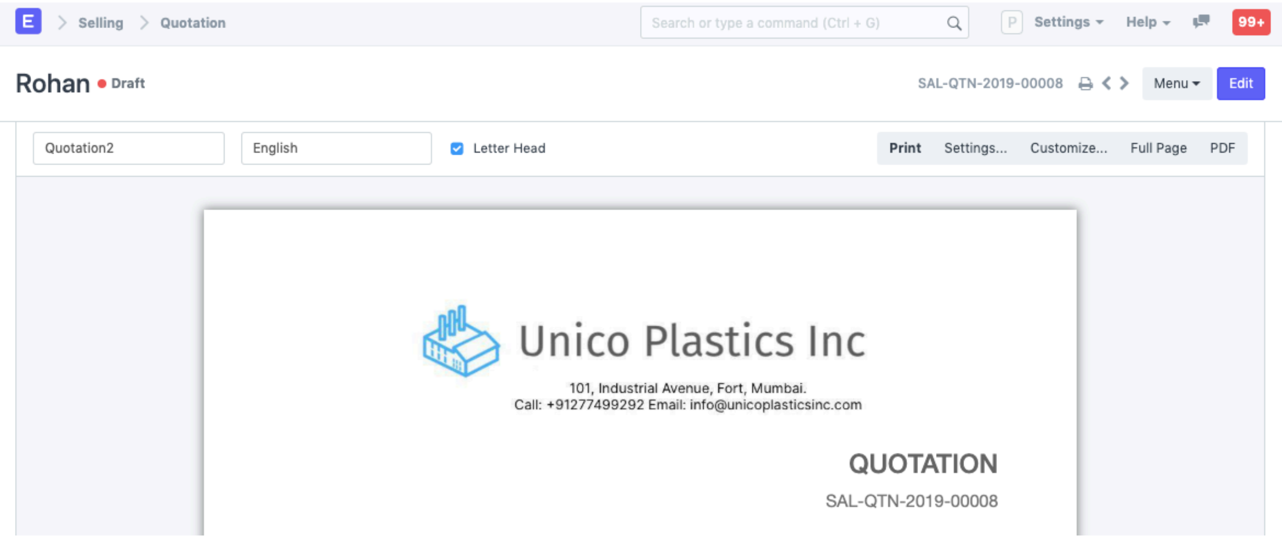
If you want to make this the default Letter Head, click on "Default Letter Head".

5. After entering values in the Header and Footer section, save the Letter Head.

You can set the Letter Head based on HTML to make changes to it:



This is how the Letter Head looks in a document's print.



Note that Footer will be visible only when the document's print is seen in the PDF. Footer will not be visible in the HTML based print preview.

DATA IMPORT

➢ Data Management

You can import, export bulk edit data from and to spreadsheet files (**.csv**) from the Data Import Export Tool. This tool will be very helpful initially to setup your data from other systems.

➢ Data Import Tool

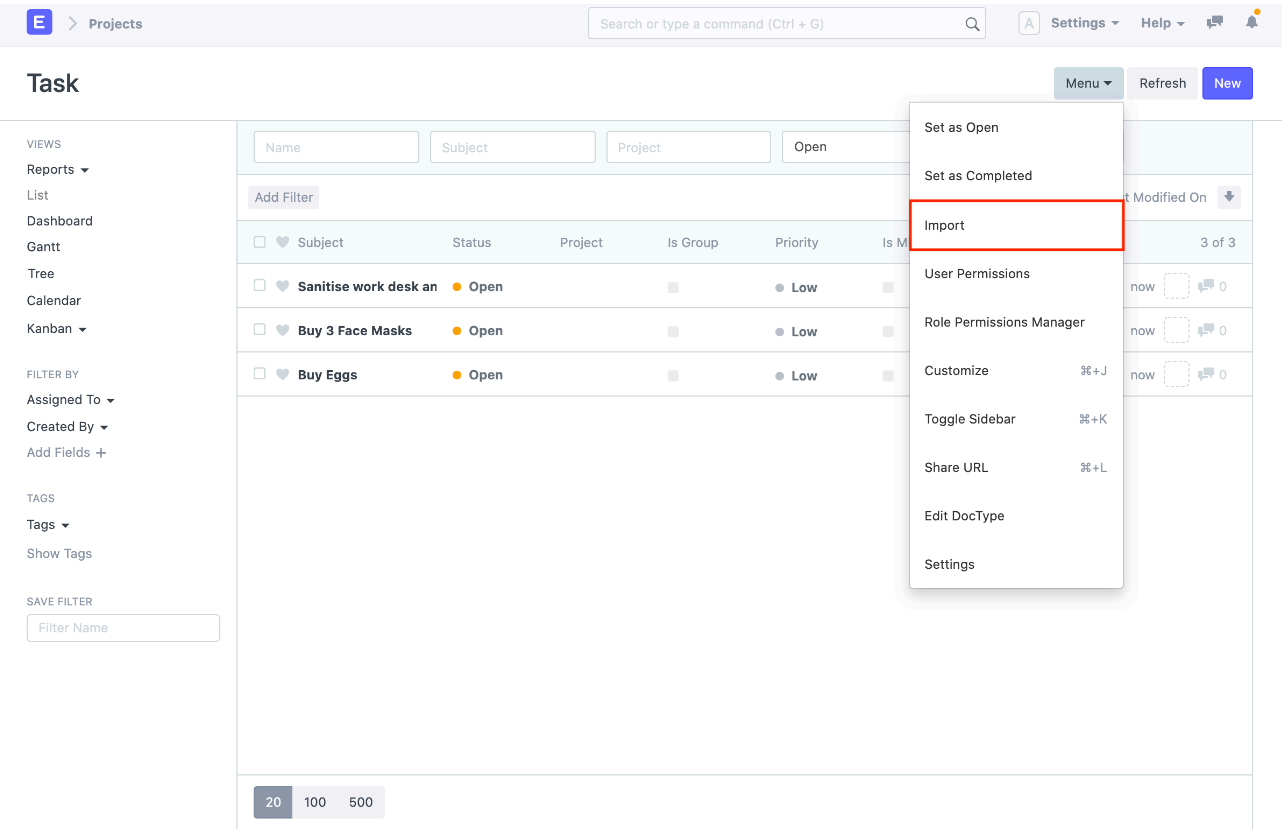
The Data Import Tool lets you import records from a CSV/Excel file.

Data Import Tool is an easy way to upload (or edit) bulk data (especially master data) into the system.

To begin importing data, go to:

Home > Data Import and Settings > Import Data

Or go to the Document you want to import and click on Menu > Import:



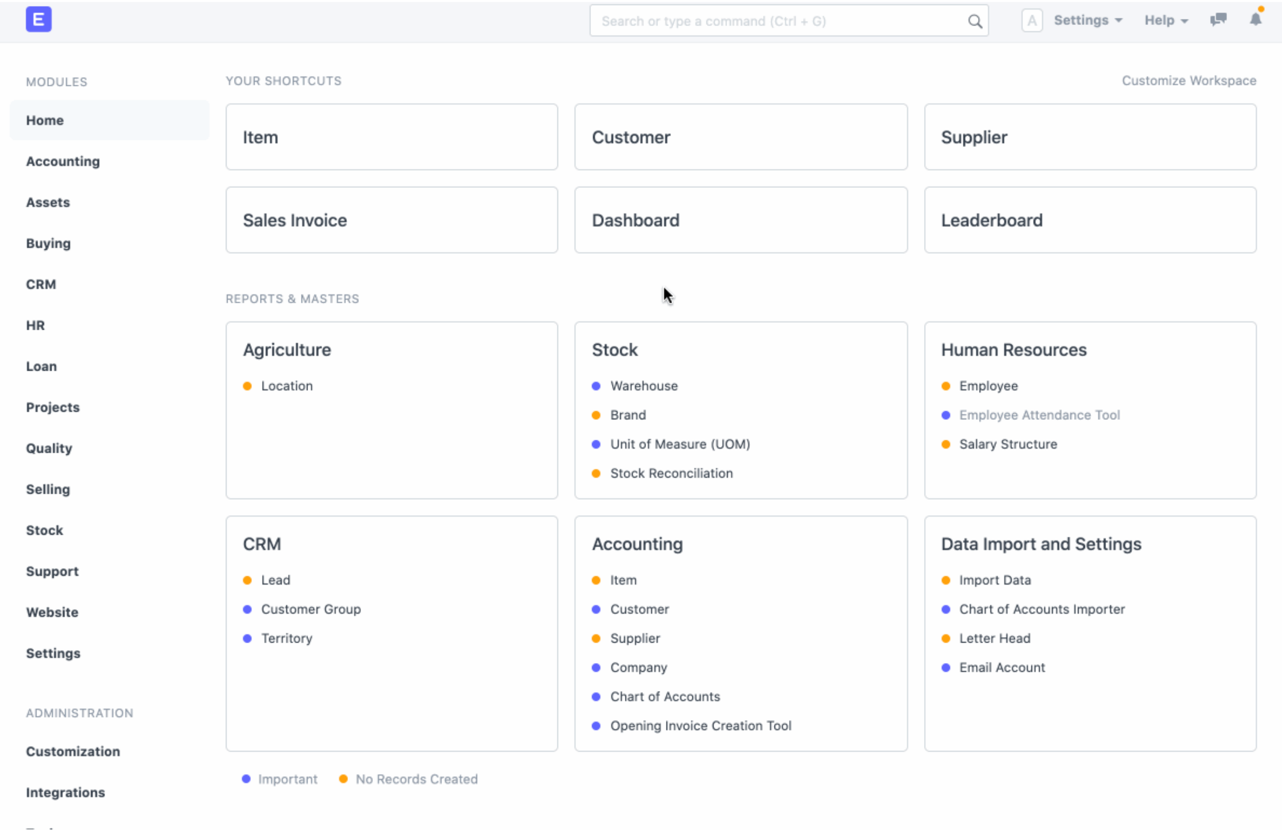
Before using Data Import **ensure** that you have all of your data ready.

1. Inserting New Records

Let's say you want to import the list of Customers from your old system into ERP. The first step is to download a template in which we can enter our data.

1.1 Download the Template

1. Go to Customer List, click on Menu > Import. Click on **New**.
2. Select Import Type as Insert New Records.
3. Click on **Save**.
4. Now, click on **Download Template**.
5. While inserting new records, the template should be blank. If you have a few Customers in your system, you can select Export Type as "5 Records" to see the format in which you have to enter the data in the template.
6. Select the File Type of the export template.
7. Select the fields that you want to fill in as the Customer details.
8. Click on **Export**.



1.2 Entering Data in the Template

Your downloaded template will look something like this:

Customer

ID	Full Name	Type	Customer Group	Territory

Open the downloaded template in a spreadsheet application (like Excel, Numbers, or Libre Office) and enter the data below the column headings shown as follows:

Customer

ID	Full Name	Type	Customer Group	Territory
	Schulist-Ferry	Company	Government	Rest of The World
	Baumbach-Bayer	Company	Commercial	India
	Kuhic, Batz and Labadie	Company		
	Schimmel LLC	Company	Commercial	Rest of The World
	Hoeger, Sanford and Kozey	Company	Government	
	Stokes-Towne	Company	Commercial	
	Reilly LLC	Company	Government	
	Wyman, Schmeler and Wilkinson	Company	Commercial	Rest of The World
	Weimann, Reinger and Schmidt	Company	Government	Rest of The World
	Cassin-Schultz	Company	Commercial	
	Biddie Butson	Individual	Individual	India
	Esdras McGrady	Individual	Individual	
	Titus Palombi	Individual		Rest of The World
	Philippe Rodman	Individual	Individual	
	Charline Larmouth	Individual	Individual	
	Gwyn Tatersale	Individual	Individual	
	Sharon Spadeck	Individual	Individual	Rest of The World
	Brook Ganing	Individual	Individual	India
	Rickard Gosney	Individual	Individual	
	Marita Grisenthwaite	Individual	Individual	India

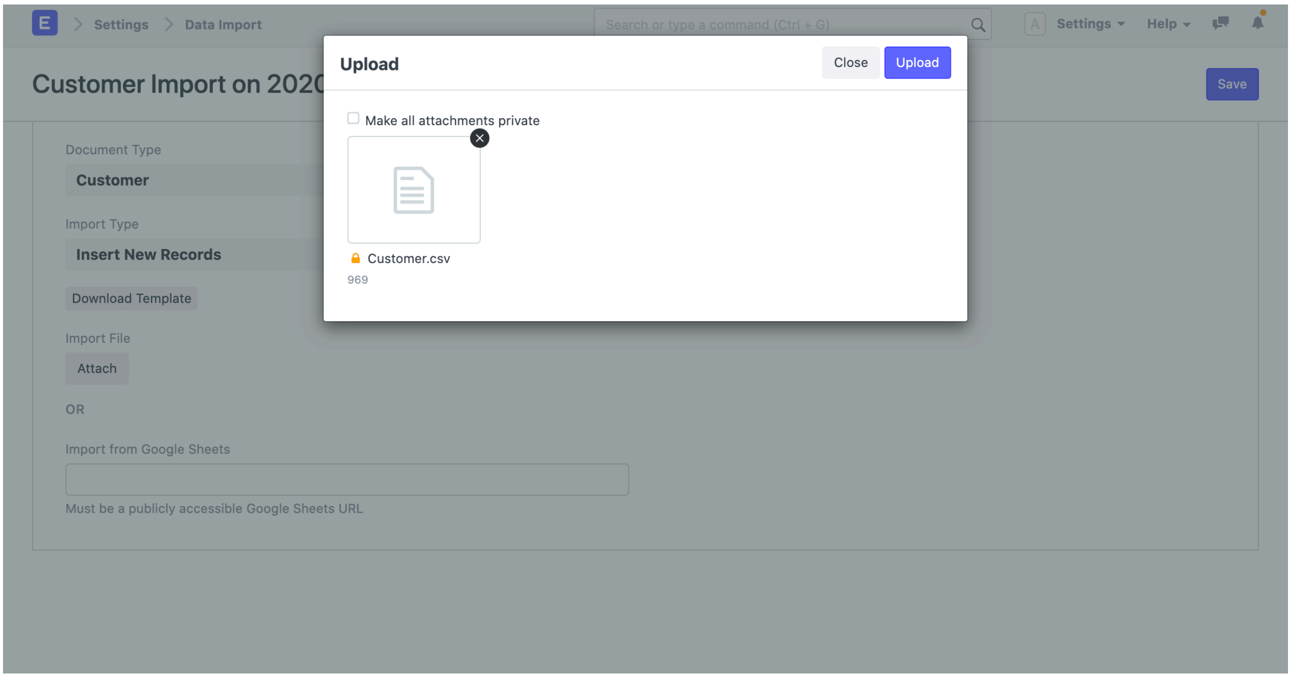
Now, save your template as an Excel or Comma Separated Values (CSV) file.

You can leave the ID column as blank while inserting new records.

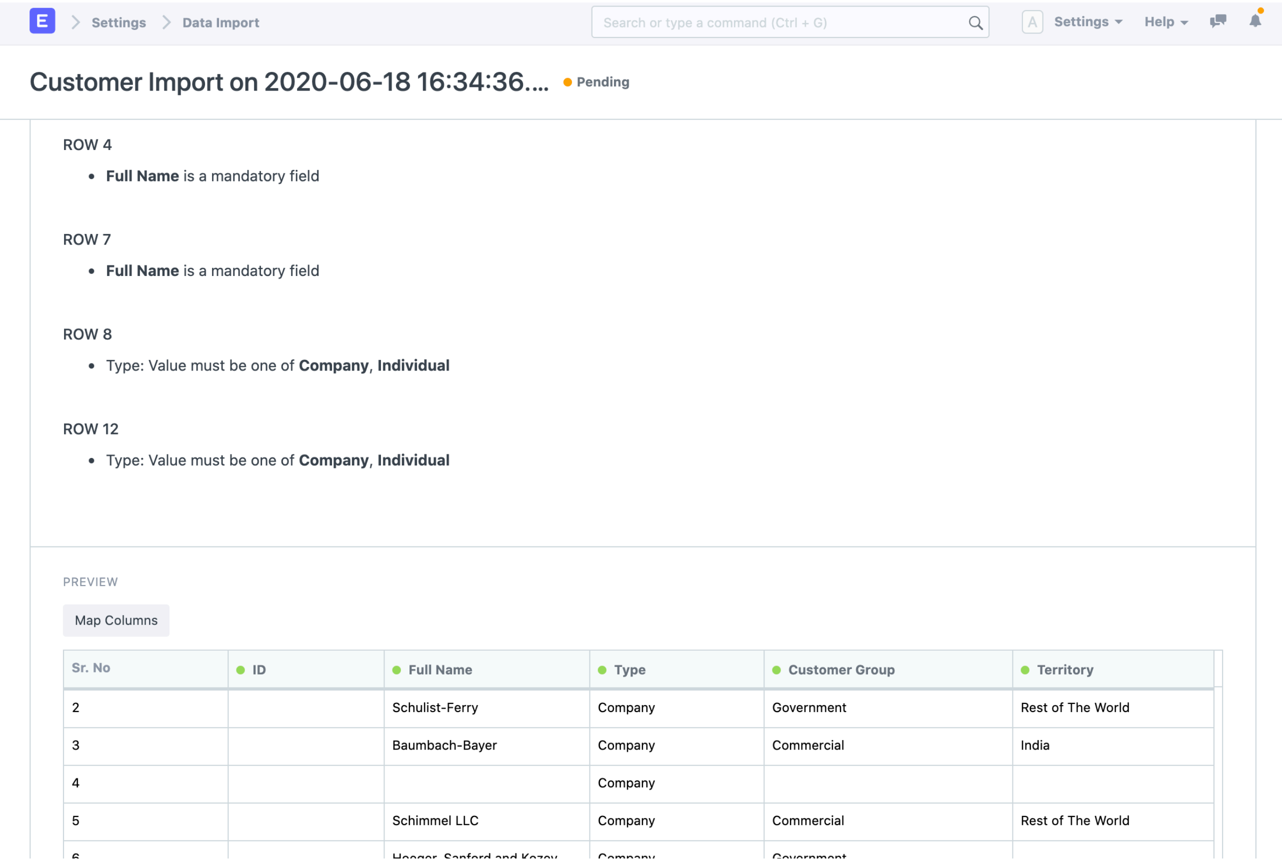
When you import this template, each row will make a Customer record in the system.

1.3 Importing the Template

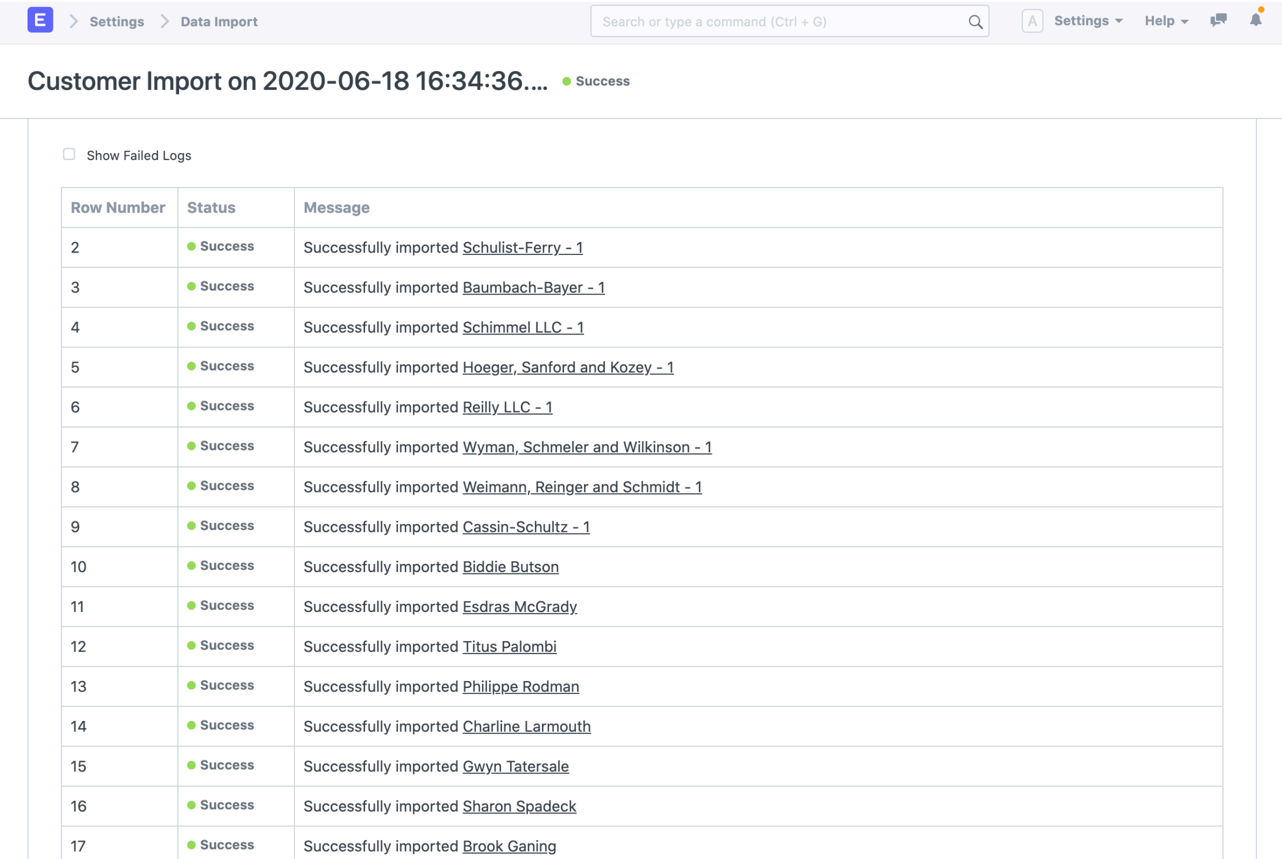
1. After updating your template file, go back to the Data Import form and attach the file by clicking on the **Attach** button.
2. Select the template file and click on **Upload**.
3. After the upload is successful, click on **Start Import**.



If there are any errors in your template, they will be shown in the Warnings section. The warnings will be categorized by Row or Column with their number so that you can easily track them down in the template and resolve them. You must resolve all the warnings before you can import the data.



After you have resolved the warnings, click on **Start Import** again to import the data. On successful import of the data, you'll see a log of each record that was created in the Import Log section.



Row Number	Status	Message
2	Success	Successfully imported Schulist-Ferry - 1
3	Success	Successfully imported Baumbach-Bayer - 1
4	Success	Successfully imported Schimmel LLC - 1
5	Success	Successfully imported Hoeger, Sanford and Kozey - 1
6	Success	Successfully imported Reilly LLC - 1
7	Success	Successfully imported Wyman, Schmeler and Wilkinson - 1
8	Success	Successfully imported Weimann, Reinger and Schmidt - 1
9	Success	Successfully imported Cassin-Schultz - 1
10	Success	Successfully imported Biddie Butson
11	Success	Successfully imported Esdras McGrady
12	Success	Successfully imported Titus Palombi
13	Success	Successfully imported Philippe Rodman
14	Success	Successfully imported Charline Larmouth
15	Success	Successfully imported Gwyn Tatersale
16	Success	Successfully imported Sharon Spadeck
17	Success	Successfully imported Brook Ganing

2. Updating Existing Records

Let's say you want to update Customer data in bulk in your system. The first step is to download the template with the data.

2.1 Download the Template

1. Go to Customer List, click on Menu > Import. Click on **New**.
2. Select Import Type as Update Existing Records
3. Click on **Save**.
4. Now, click on **Download Template**.
5. While updating existing records, you must export the records from the system with the ID field and the fields that you want to update. You can choose All Records or Filtered Records depending on your case.
6. Select the fields that you want to update for the Customer records.
7. Click on **Export**.

2.2 Updating Data in the Template

Your downloaded template will look something like this:

Customer

ID	Full Name	Type	Customer Group	Territory
Marita Grisenthwaite	Marita Grisenthwaite	Individual	Individual	India
Rickard Gosney	Rickard Gosney	Individual	Individual	All Territories
Brook Ganing	Brook Ganing	Individual	Individual	India
Sharon Spadeck	Sharon Spadeck	Individual	Individual	Rest Of The World
Gwyn Tatersale	Gwyn Tatersale	Individual	Individual	All Territories
Charline Larmouth	Charline Larmouth	Individual	Individual	All Territories
Philippe Rodman	Philippe Rodman	Individual	Individual	All Territories
Titus Palombi	Titus Palombi	Individual	All Customer Groups	Rest Of The World
Esdras McGrady	Esdras McGrady	Individual	Individual	All Territories
Biddie Butson	Biddie Butson	Individual	Individual	India
Cassin-Schultz	Cassin-Schultz	Company	All Customer Groups	All Territories
Weimann, Reinger and Schmidt	Weimann, Reinger and Schmidt	Company	All Customer Groups	All Territories
Wyman, Schmeler and Wilkinson	Wyman, Schmeler and Wilkinson	Company	All Customer Groups	All Territories
Reilly LLC	Reilly LLC	Company	All Customer Groups	All Territories
Stokes-Towne	Stokes-Towne	Company	All Customer Groups	All Territories
Hoeger, Sanford and Kozey	Hoeger, Sanford and Kozey	Company	All Customer Groups	All Territories
Schimmel LLC	Schimmel LLC	Company	All Customer Groups	All Territories
Kuhic, Batz and Labadie	Kuhic, Batz and Labadie	Company	All Customer Groups	All Territories
Baumbach-Bayer	Baumbach-Bayer	Company	All Customer Groups	All Territories
Schulist-Ferry	Schulist-Ferry	Company	All Customer Groups	All Territories

Now, change the values in your template and save the file as Excel or CSV.

While exporting records for updating them, ensure that the ID column is exported and is untouched. The values in the ID column are used to identify the records in the system. You can update the values in other columns but not in the ID column. If you remove some child table row, the system will consider that the row is supposed to be deleted.

2.3 Importing the Template

Follow the steps in Importing the Template section above.

3. Importing Child Records

Data in ERP is stored in tables like a spreadsheet with columns and rows of data. Each form likes Sales Order has multiple fields like Customer, Company, etc. It also has tables like the item table, tax table, etc. In Data Import, the set of fields in the Sales Order are treated as the main table and the rows inside the child table (item table) are treated as the child table for data import.

Each form in ERP can have multiple child tables associated with it. The child tables are linked to the parent tables and are implemented where there are multiple values for any property. For example, an Item can have multiple prices, a Sales Invoice has multiple Items, Taxes, and so on. When you export a document with child tables, for e.g., each child row will appear on a separate row but it is associated with a single parent row. The subsequent values in the parent columns will remain blank. You must ensure that this order is not broken when you are importing them via Data Import.

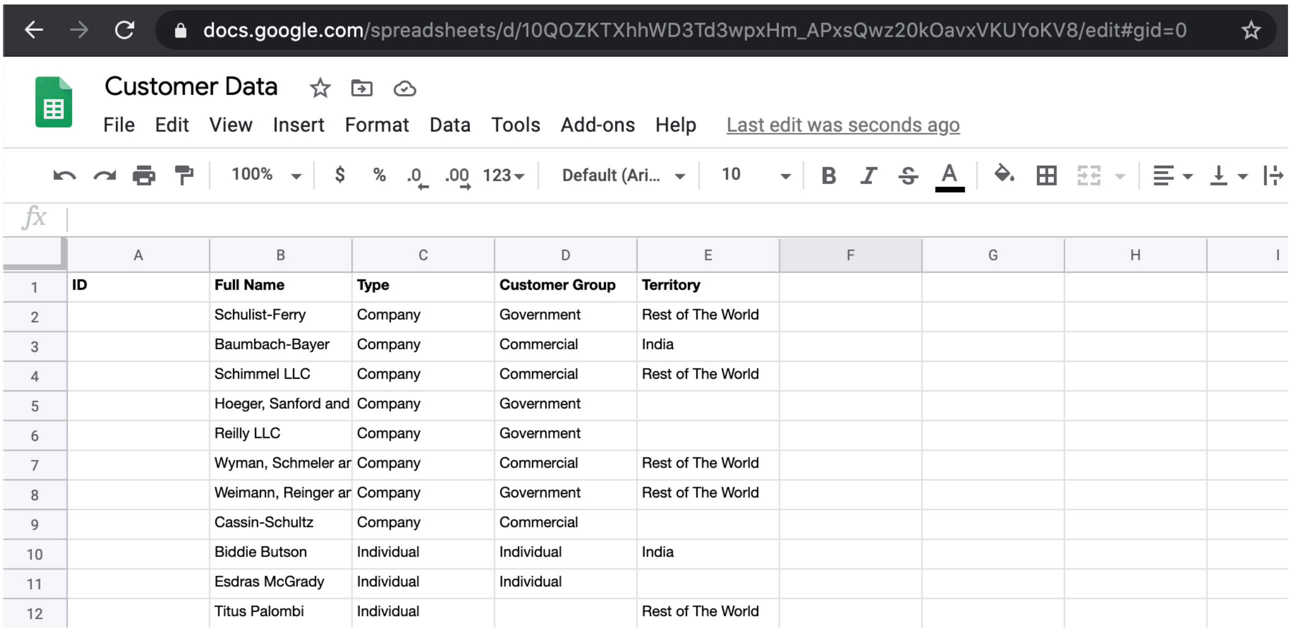
Quotation

ID	Series	Quotation To	Company	Date	Price List	ID (Items)	Item Code (Items)	Item Name (Items)	Description (Items)	Quantity (Items)	UOM (It
SAL-QTN-2020-00001	SAL-QTN-.YYYY.-	Customer	Tennis Mart	2020-06-18	Standard	415bed37e0	Tennis Ball	Tennis Ball	Tennis Ball	1.0	Unit
						df437bdbf4	Tennis Racquet	Tennis Racquet	Tennis Racquet	1.0	Unit

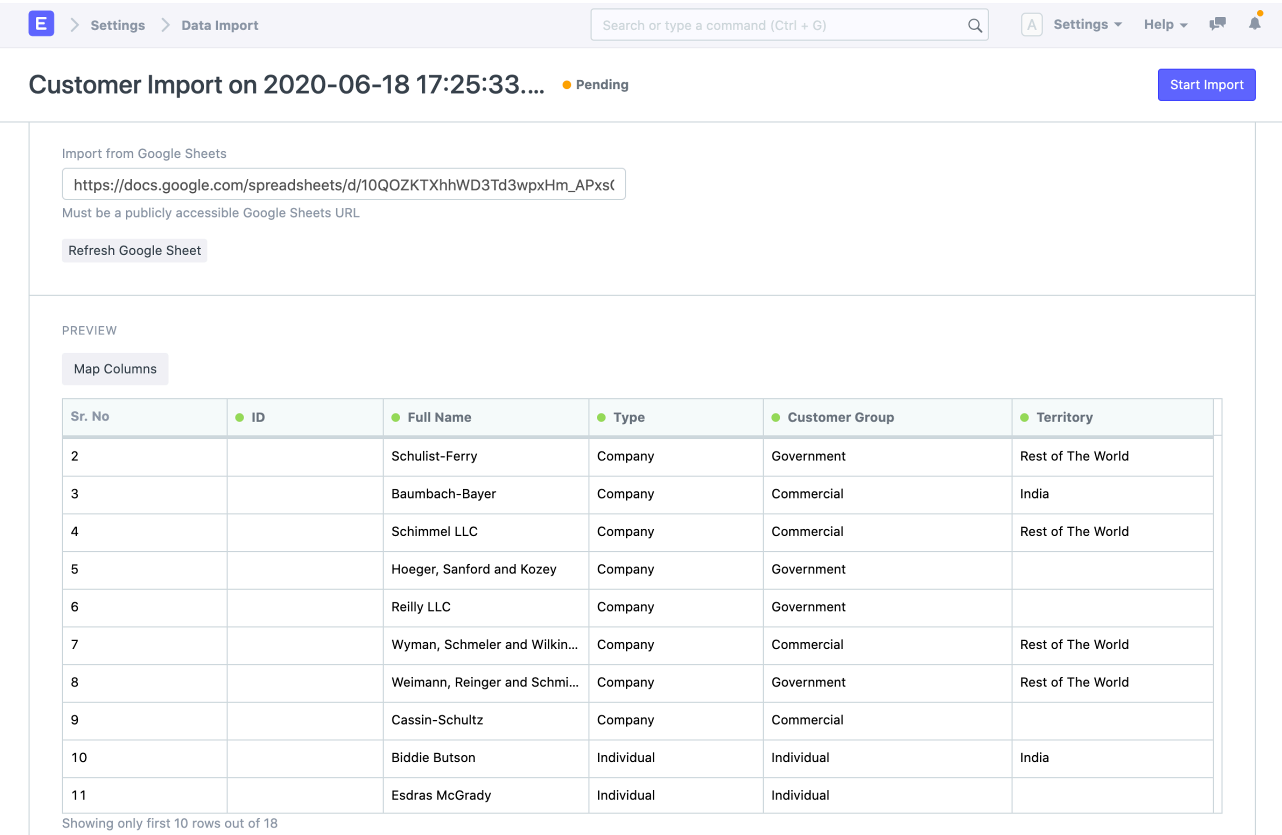
4. Import Options

4.1 Import from Google Sheets

You can also import data from Google Sheets. Import your template in Google Sheets and enter the data. Make sure the Google Sheet is public. You can test this by opening the Google Sheets URL in an incognito browser window.



	A	B	C	D	E
1	ID	Full Name	Type	Customer Group	Territory
2		Schulist-Ferry	Company	Government	Rest of The World
3		Baumbach-Bayer	Company	Commercial	India
4		Schimmel LLC	Company	Commercial	Rest of The World
5		Hoeger, Sanford and	Company	Government	
6		Reilly LLC	Company	Government	
7		Wyman, Schmeler ar	Company	Commercial	Rest of The World
8		Weimann, Reinger ar	Company	Government	Rest of The World
9		Cassin-Schultz	Company	Commercial	
10		Biddie Butson	Individual	Individual	India
11		Esdras McGrady	Individual	Individual	
12		Titus Palombi	Individual		Rest of The World



Sr. No	ID	Full Name	Type	Customer Group	Territory
2		Schulist-Ferry	Company	Government	Rest of The World
3		Baumbach-Bayer	Company	Commercial	India
4		Schimmel LLC	Company	Commercial	Rest of The World
5		Hoeger, Sanford and Kozey	Company	Government	
6		Reilly LLC	Company	Government	
7		Wyman, Schmeler and Wilkin...	Company	Commercial	Rest of The World
8		Weimann, Reinger and Schmi...	Company	Government	Rest of The World
9		Cassin-Schultz	Company	Commercial	
10		Biddie Butson	Individual	Individual	India
11		Esdras McGrady	Individual	Individual	

Showing only first 10 rows out of 18

4.2 Submit After Import

In ERP document types are mainly of two types - masters and transactions. The masters are records like Customer and Task which can only be saved not submitted. Transactions like Sales Orders, Purchase Invoices are submittable documents and can be submitted.

When you select a submittable document type for Import, you can tick **Submit After Import** to submit the document after it is imported.

4.3 Don't Send Emails

Let's say you have created a Notification in your system and whenever a Lead is created an email is sent. Now, if you are bulk importing Leads then a lot of emails will be sent, which may not be desired. You can disable this option to avoid sending emails.

5. Additional Notes

5.1 Upload Limit

There is no hard limit on the number of records that can be imported. But you must try and upload only a few thousand records at a time. Importing a large number of records (let's say 50,000) might slow down the system considerably for the users that are using the system.

5.2 CSV Files

A CSV (Comma Separated Value) file is a data file that you can upload into ERP to update various data. Any spreadsheet file from popular spreadsheet applications like MS Excel or Open Office Spreadsheet can be saved as a CSV file.

If you are using Microsoft Excel and using non-English characters, make sure to save your file encoded as UTF-8.

For older versions of Excel, there is no clear way of saving as UTF-8. So save your file as CSV, then open it in Notepad, then save as "UTF-8" . (Or upgrade your Excel!)

➤ Data Export

Data Export lets you export data from DocTypes to a CSV or an Excel format.

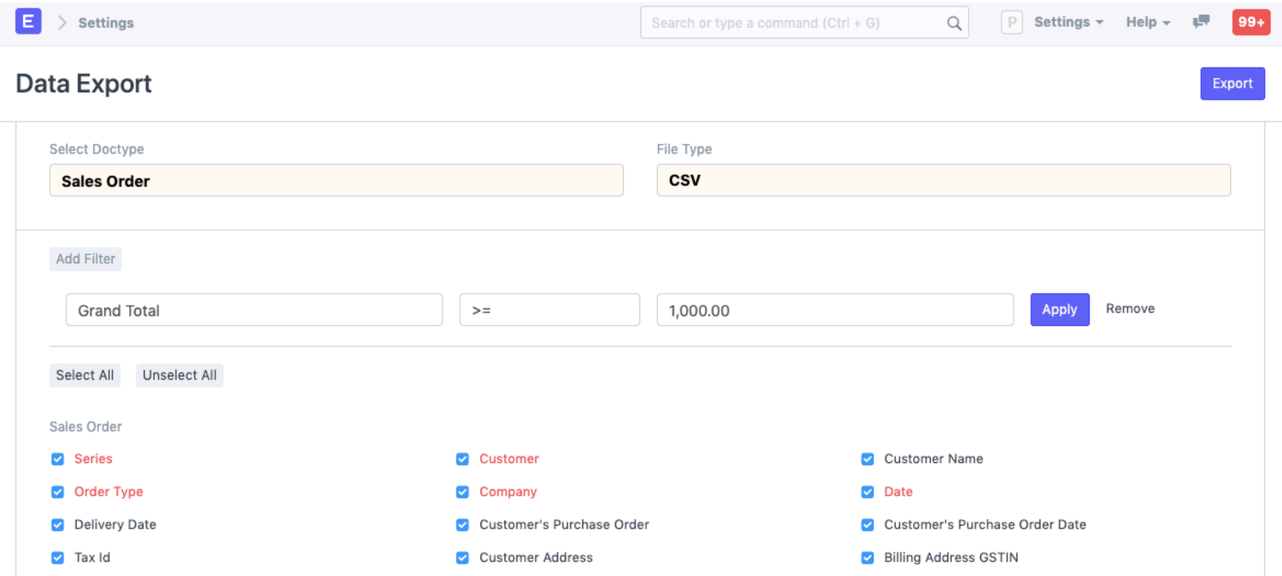
After exporting data, you can use the same file to import data using Data Import.

To access Data Export, go to:

Home > Settings > Data Export

1. How to Use Data Export

1. Go to the Data Export DocType.
2. Select the DocType whose data you want to export.
3. Select the file format whether CSV or Excel.
4. Select the fields to export, the red ones are mandatory.
5. You can also add filters to select only specific data, for example, Grand Total >= 1,000 for Sales Orders.
6. Click on Export to download the file.



➢ Chart Of Accounts Importer

When a new company is created in ERP, the Chart of Accounts for it is created by default with a pre-set structure. However, if you have your own Chart of Accounts, you can import it using the Chart of Accounts Importer.

It allows you to create your own Chart of Accounts according to your requirement and import it into the system.

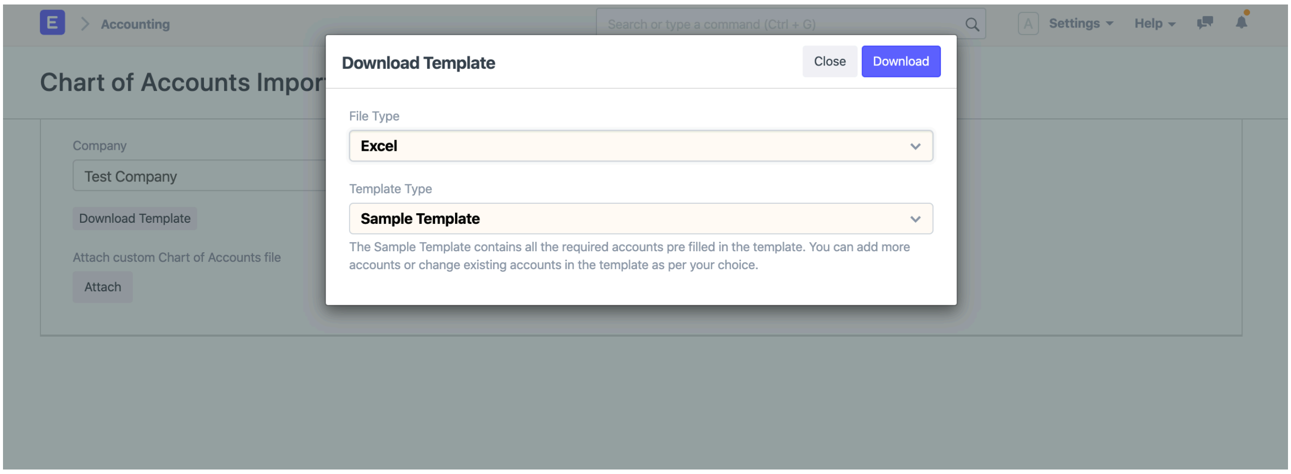
Any existing Chart Of Accounts against that company will be overwritten. Make sure the company you are selecting doesn't have any pre-existing transactions otherwise you'll receive a validation error.

To access, go to:

Home > Getting Started > Chart of Accounts Importer

1. How to import Chart Of Accounts

1. Select the Company for which you want to import the Chart of Accounts.
2. Click on "Download Template" button to download the template. Select file type in which you want to download the template. Select the template type and click on "Download". "Sample Template" contains pre-filled sample data so that you get an idea of how to fill the template. You can edit the data in "Sample Template" itself or download "Blank Template" for a fresh template.



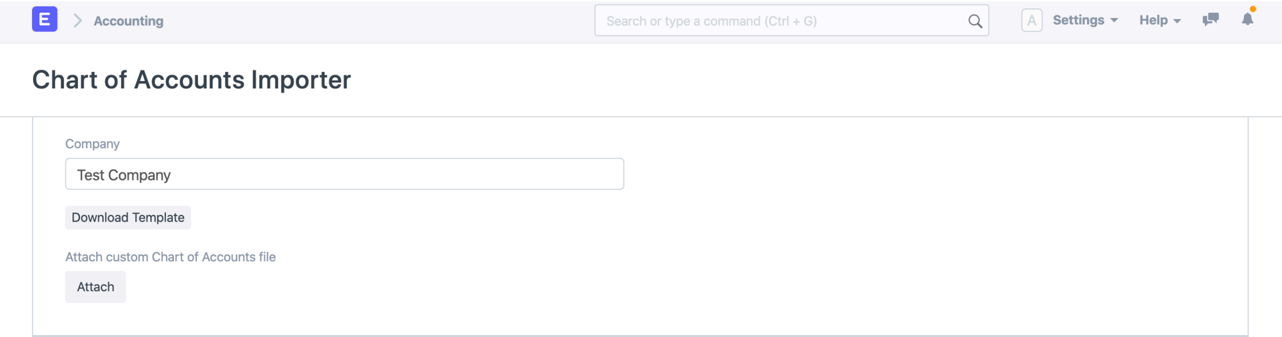
Account Name	Parent Account	Account Number	Is Group	Account Type	Root Type
			1		Asset
			1		Liability
			1		Expense
			1		Income
			1		Equity
			1	Bank	Asset
			1	Cash	Asset
			1	Stock	Asset
			0	Cost of Goods Sold	Expense
			0	Depreciation	Expense
			0	Fixed Asset	Asset
			0	Payable	Liability
			0	Receivable	Asset
			0	Stock Adjustment	Expense
			0	Bank	Asset
			0	Cash	Asset
			0	Stock	Asset

3. Once you download the template, fill in the details in the template as shown in the sample template below. Please make sure to make accounts for account types "Cost of Goods Sold", "Depreciation", "Fixed Asset", "Payable", "Receivable", "Stock Adjustment". Root types for these accounts must be one of Asset, Liability, Income, Expense, and Equity.

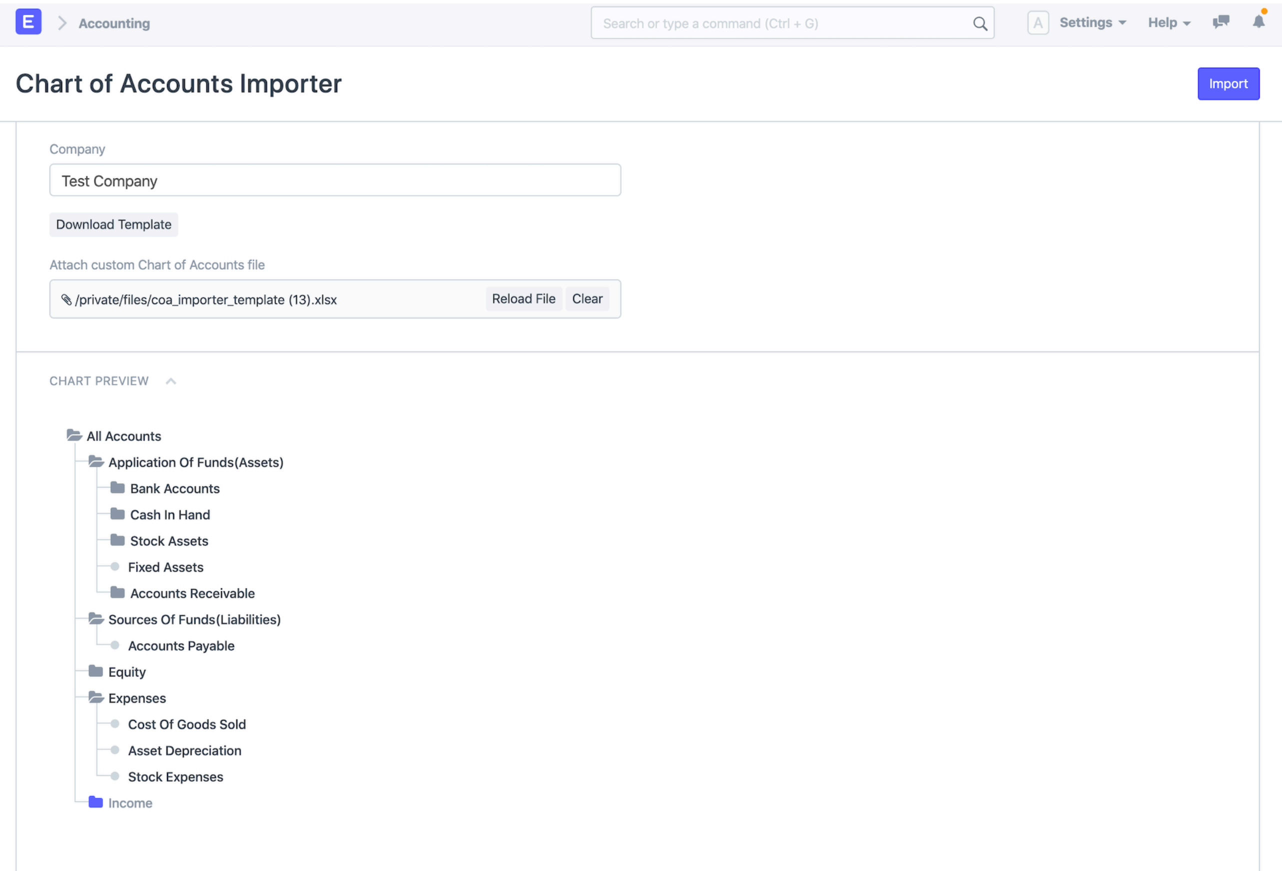
To know more about "Account Types" and "Root Types" click here click here

Account Name	Parent Account	Account Number	Is Group	Account Type	Root Type
Application Of Funds(Assets)			1		Asset
Sources Of Funds(Liabilities)			1		Liability
Equity			1		Equity
Expenses			1		Expense
Income			1		Income
Bank Accounts	Application Of Funds(Assets)		1	Bank	Asset
Cash In Hand	Application Of Funds(Assets)		1	Cash	Asset
Stock Assets	Application Of Funds(Assets)		1	Stock	Asset
Cost Of Goods Sold	Expenses		0	Cost of Goods Sold	Expense
Asset Depreciation	Expenses		0	Depreciation	Expense
Fixed Assets	Application Of Funds(Assets)		0	Fixed Asset	Asset
Accounts Payable	Sources Of Funds(Liabilities)		0	Payable	Liability
Accounts Receivable	Application Of Funds(Assets)		1	Receivable	Asset
Stock Expenses	Expenses		0	Stock Adjustment	Expense
Sample Bank	Bank Accounts		0	Bank	Asset
Cash	Cash In Hand		0	Cash	Asset
Stores	Stock Assets		0	Stock	Asset

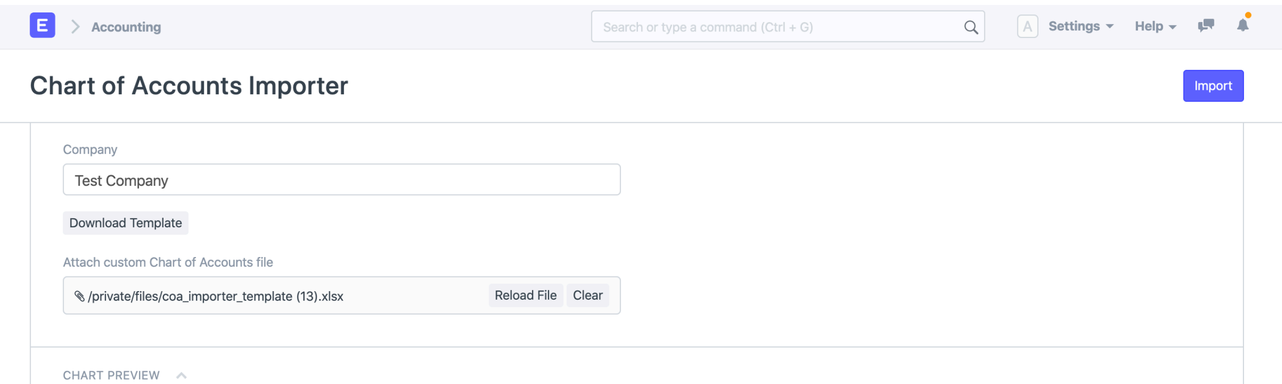
4. Click on "Attach" to upload the template.



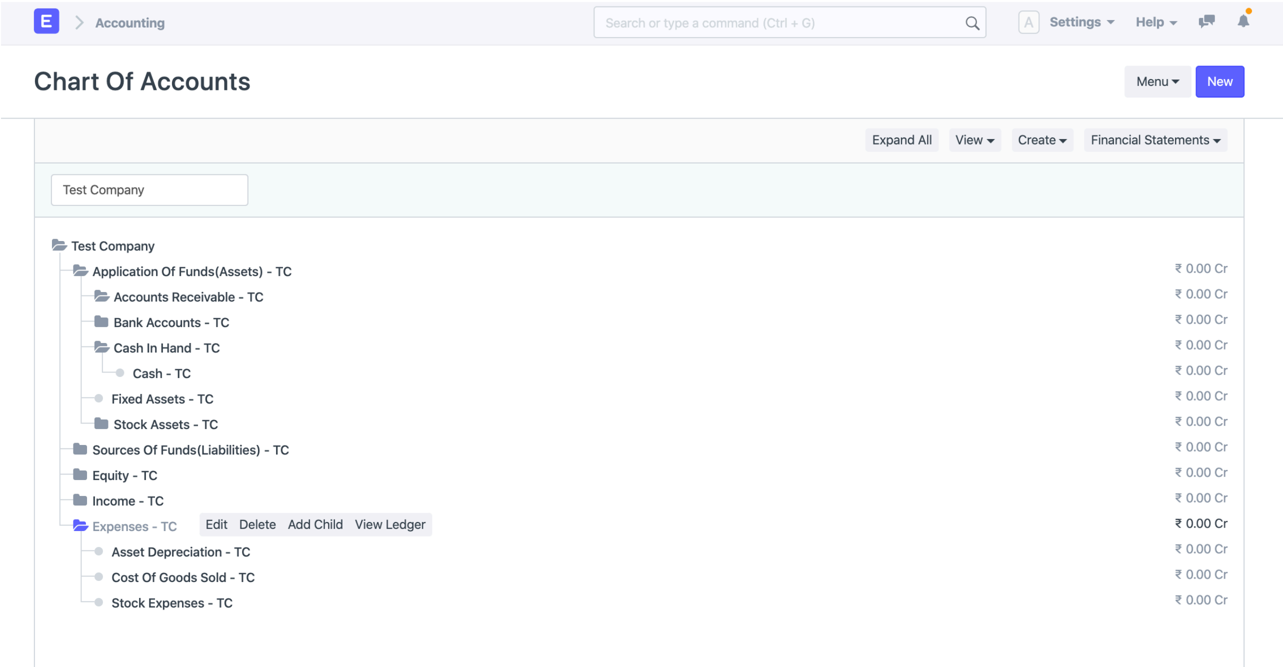
5. Once you upload the template you'll be able to see the preview of the Chart of Accounts in the Chart Preview section.



6. If everything seems correct in the preview, click on "Import" in the top right corner and the accounts will be created.



7. To verify the created accounts, you can go to Chart of Accounts and see the newly created accounts for that company.

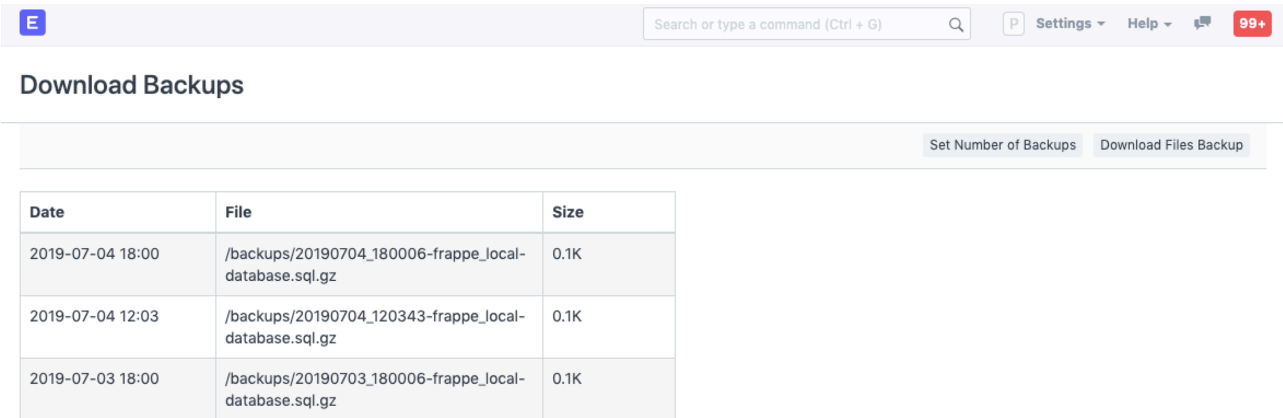


➢ Downloading Backups

In the ERP, you can manually download database backup. To get the latest database backup, go to:

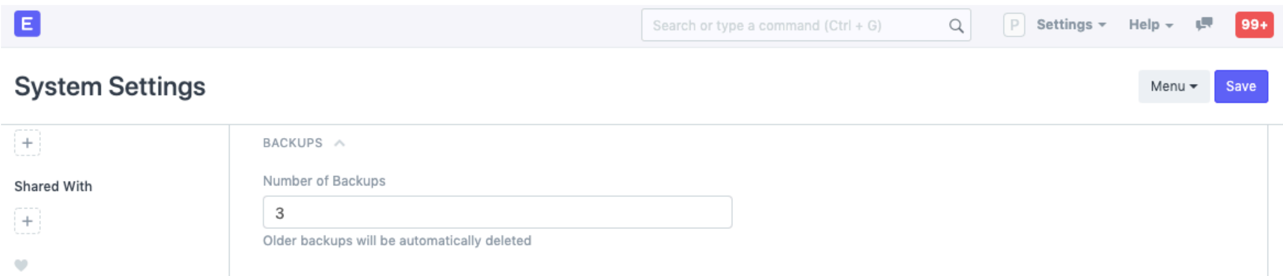
Home > Settings > Download Backups

Backup available for the download is updated in every eight hours. Click on the link to download the backup at a given time.



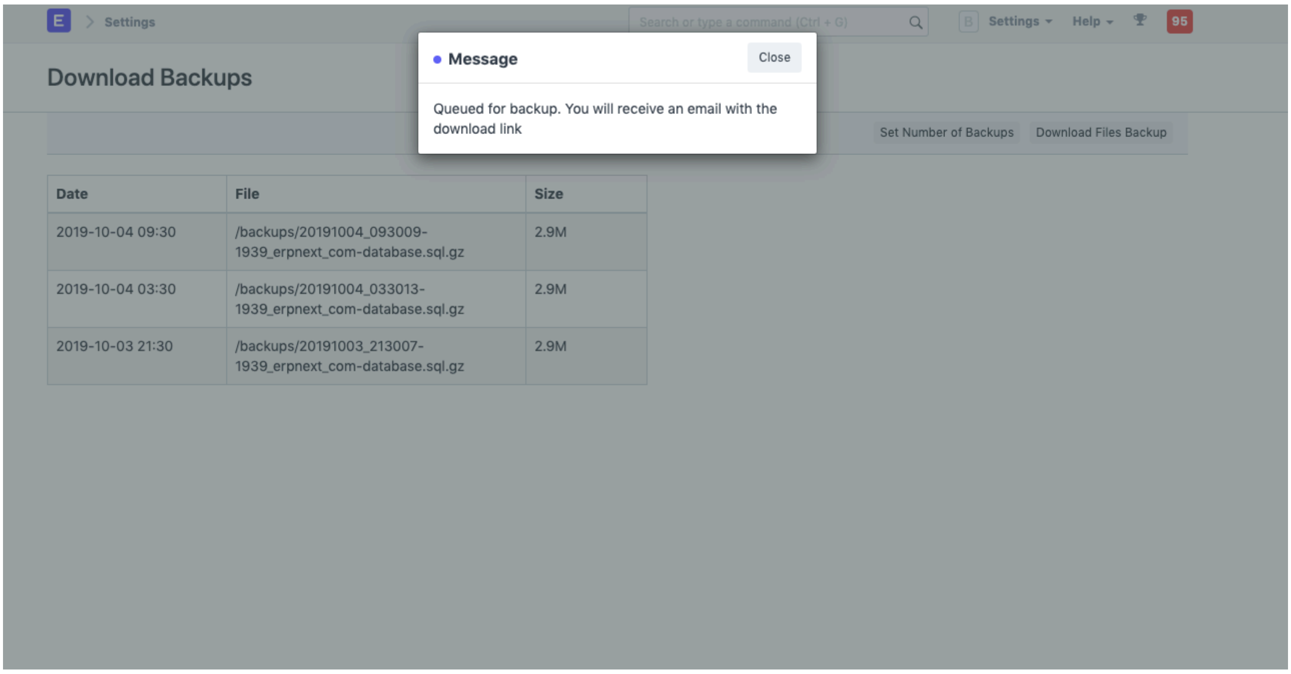
Date	File	Size
2019-07-04 18:00	/backups/20190704_180006-frappe_local-database.sql.gz	0.1K
2019-07-04 12:03	/backups/20190704_120343-frappe_local-database.sql.gz	0.1K
2019-07-03 18:00	/backups/20190703_180006-frappe_local-database.sql.gz	0.1K

By default three latest backups will be available for the download. To change this, click on "Set Number of Backups". This will take you to System Settings where you can set Number of Backups available for download at a time.



➢ Downloading Files Backup

Clicking on Download Files Backup will send an email with links to the backup for both private and public files. Email must be configured for this to work.



Automating Backups to Cloud Storage

You can also automate your backups to be uploaded directly on a cloud storage platform. Currently, ERP supports:

1. Amazon S3
2. Dropbox
3. Google Drive

USERS AND PERMISSIONS

➢ Adding Users

Users can be added by the System Manager. To add users go to:

Home > Users and Permissions > User

There are two main types of users:

Website users: Customers, Suppliers, Students, etc., who have access only to the portal and not to any modules. **System Users**: People using ERP in the Company with access to modules, company data, etc.

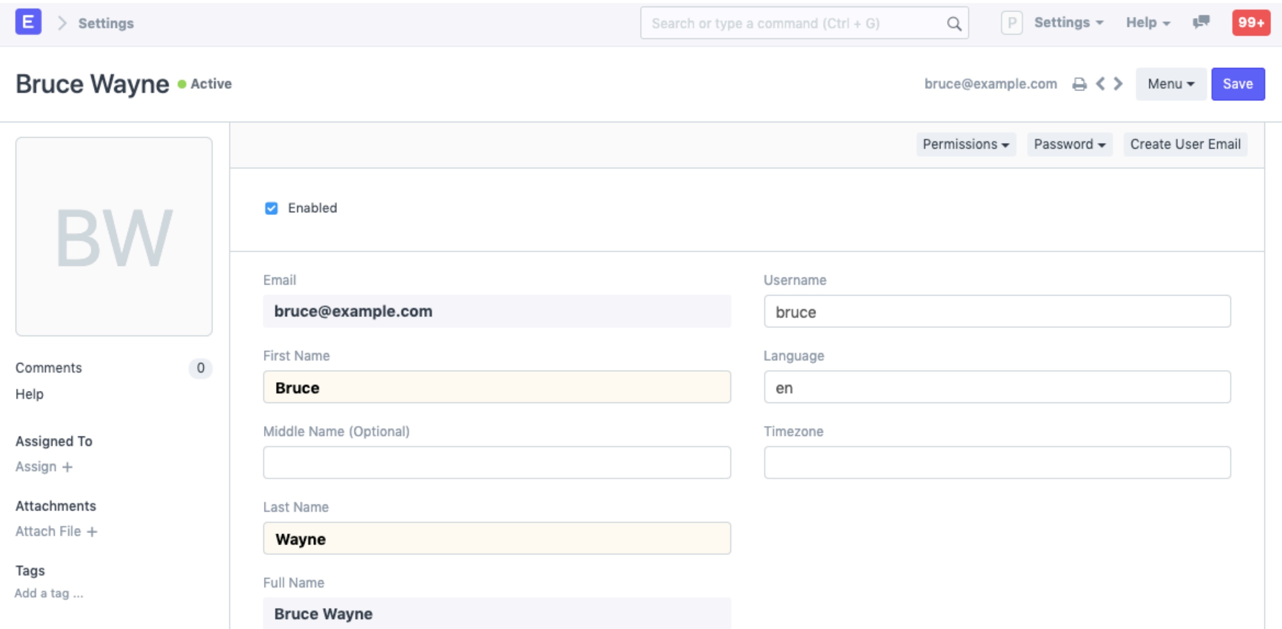
Read more about difference between system and website user.

Under User, a lot of info can be entered. For the sake of usability, the information entered for web users is minimal: First Name and Email.

An Email address is the unique key (ID) identifying the Users.

1. How to Create a New User

1. Go to the User list, click on New.
2. Add an Email address and name of the user.
3. Save.

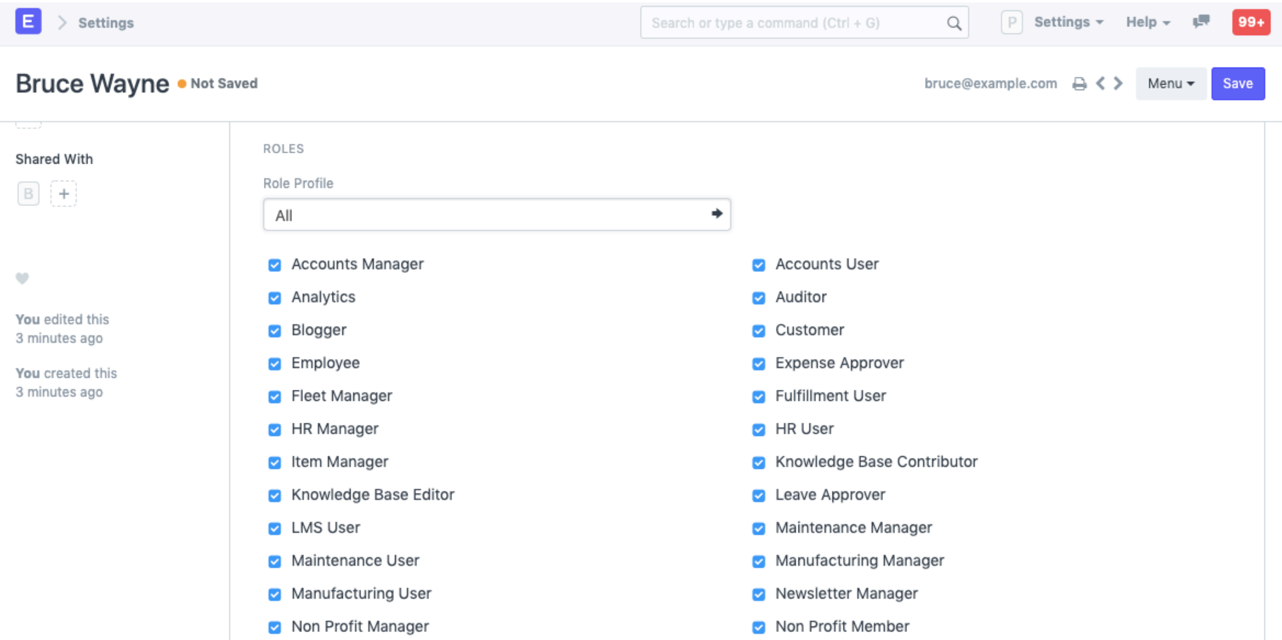


Details like Username and Language can also be changed.

2. Features

2.1 Setting Roles

After saving, you will see a list of roles and checkboxes next to them. Just check the roles you want the user to have and save the document. The roles have pre-defined permissions, to know more about roles, click here. You can set Role profiles to use as a template which selects multiple roles together.



2.2 More Information

More information about the employee can be set from this section:

- Gender
- Phone
- Mobile No
- Birth Date
- Location
- Interests
- Bio
- Banner Image

Ticking on 'Mute Sounds' will mute sounds that play on interacting with documents. The user may need to do a Settings > Reload for the changes to take place.

2.3 Change Password

- **Set New Password**: As a System Manager, you can set a new password for the user if it needs to be changed.
- **Send Password Update Notification**: Send an email notification to the user that their password has been changed.
- **Log out from all devices while changing Password**: When changing the user's password, this logs out the user from PC and any mobile device they may have logged into.

2.4 Document Follow

With this option you can follow various documents in the system and get email notifications when they are updated. Know more here.

2.5 Email Settings

- **Send Notifications for Email threads**: The user will get notifications for Email conversations that take place in document types like Opportunities.
- **Send Me A Copy of Outgoing Emails**: Sends the user a copy of the emails they send. This is useful for keeping track if the email got sent.
- **Allowed In Mentions**: Allow this user's name to appear in thread conversations so that they can be mentioned using '@'.
- **Email Signature**: Adding an email signature here will set it as default for all outgoing emails for the user. This is different from a footer which is set from the Company master.

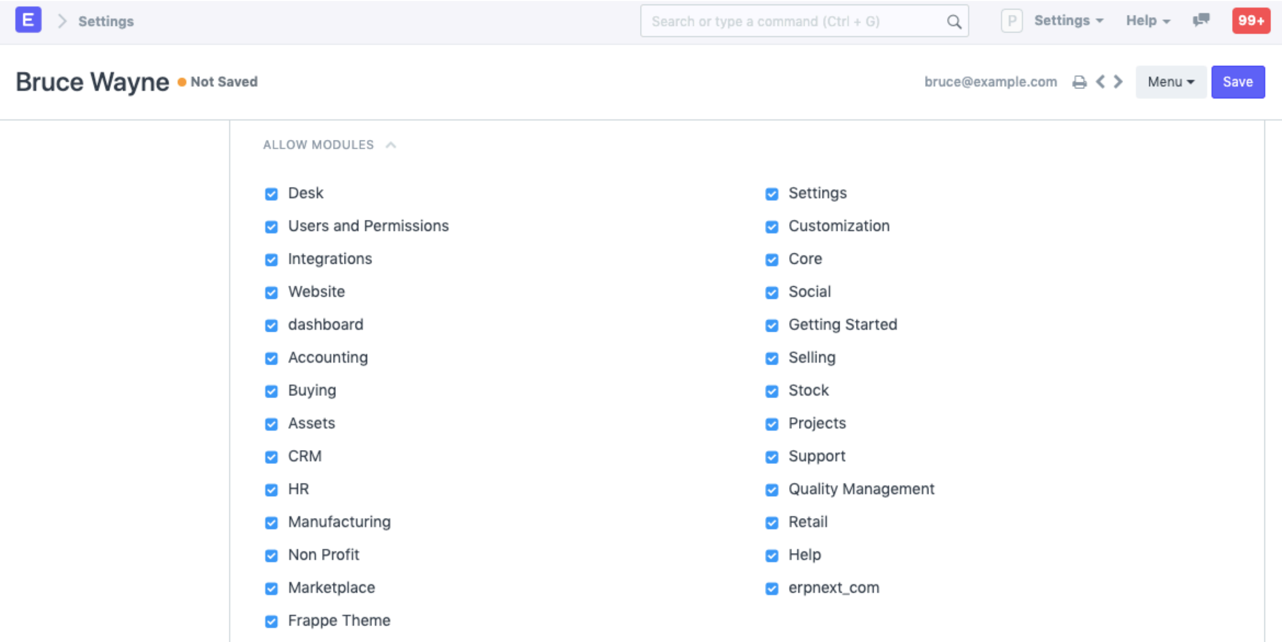
2.6 Email Inbox

Subscribe the user to different mailing lists of your company from this section. Add a new row and select the mailing list to assign this user.

For example, mailing lists can be jobs, support, sales, etc. To know more about Email Inbox, click here.

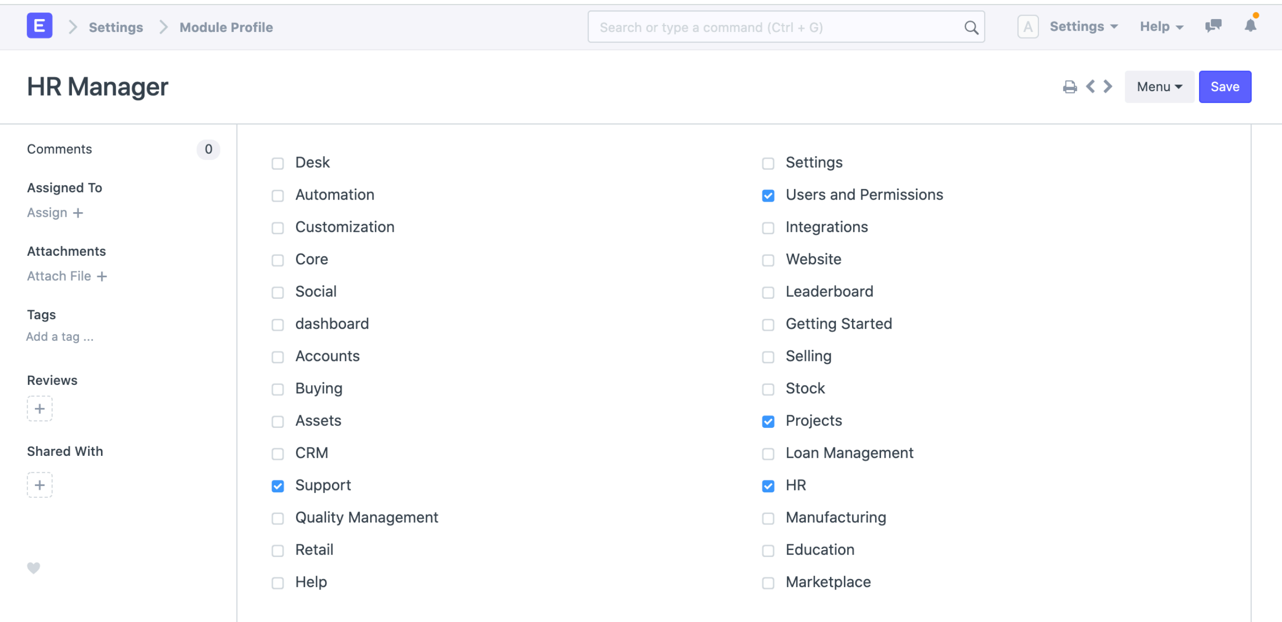
2.7 Allow Module Access

Users will have access to all modules for which they have role-based access. If you want to restrict access of certain modules for this user, un-check the modules from this list.



2.7.1 Module Profiles

Role Profiles act as a template to store and select access to multiple modules. This Role Profile can then be assigned to a User. For example, HR Users will have access to multiple modules like HR, Payroll, etc. Role Profiles are useful to provide access to multiple modules at once when adding multiple users.



2.8 Security Settings

- **Simultaneous Sessions**: Simultaneous login sessions the user is allowed. You can use the same set of credentials for multiple users by allowing more sessions. This can be restricted from System Settings globally. For cloud account, the total number of simultaneous sessions cannot exceed the total number of subscribed users.
- **User Type**: If the user has any role checked other than Customer, Supplier, Patient, or Student they automatically become a System User. This field is read-only.

- **Login After, Login Before**: If you wish to give the user access to the system only between office hours, or during weekends, specify it here. For example, if office hours are from 10 am to 6 pm, set the Login After, Login Before hours as 10:00 and 18:00.
- **Restrict IP**: Restrict user login to the IPs specified here. This can be used so that the user can log in only from office computers. Multiple IPs can be added separated by commas.

This section also shows other details like Last Login, Last IP, and Last Active time for the user.

2.9 Third Party Authentication

This will allow users to use Facebook, Google, or GitHub to log in. To use this feature, signup for a developer account with Facebook, Google, GitHub, etc. Create an app on their console, specify an app name, the originating URL and callback URL, copy the client ID and client secret info here to start using.

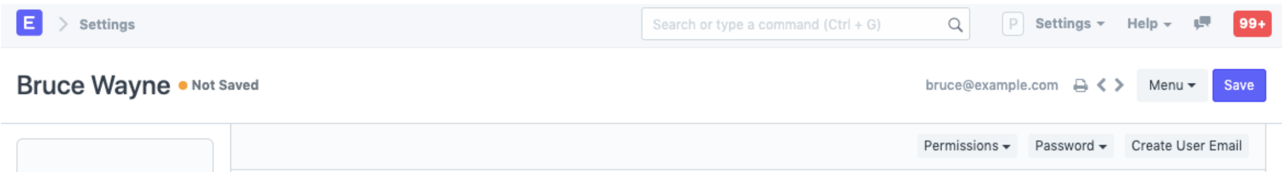
For more details, go to this page.

2.10 API Access

You can generate API Secret keys from this section using the Generate Keys button. This can be used to access your account's data from another application, for example, an offline POS system.

2.11 After saving

After saving a user, these buttons will be seen on the dashboard area of the User master.



Permissions

- **Set User Permissions**: Will take you to the User Permissions page of Bruce from where you can restrict Bruce's access to documents.
- **View Permitted Documents**: Will take you to the 'Permitted Documents For User' report for this user. Here you can see which documents does Bruce have access to. For example, on selected Sales Order, the list of Sales Orders Bruce has access to will be displayed.

Password

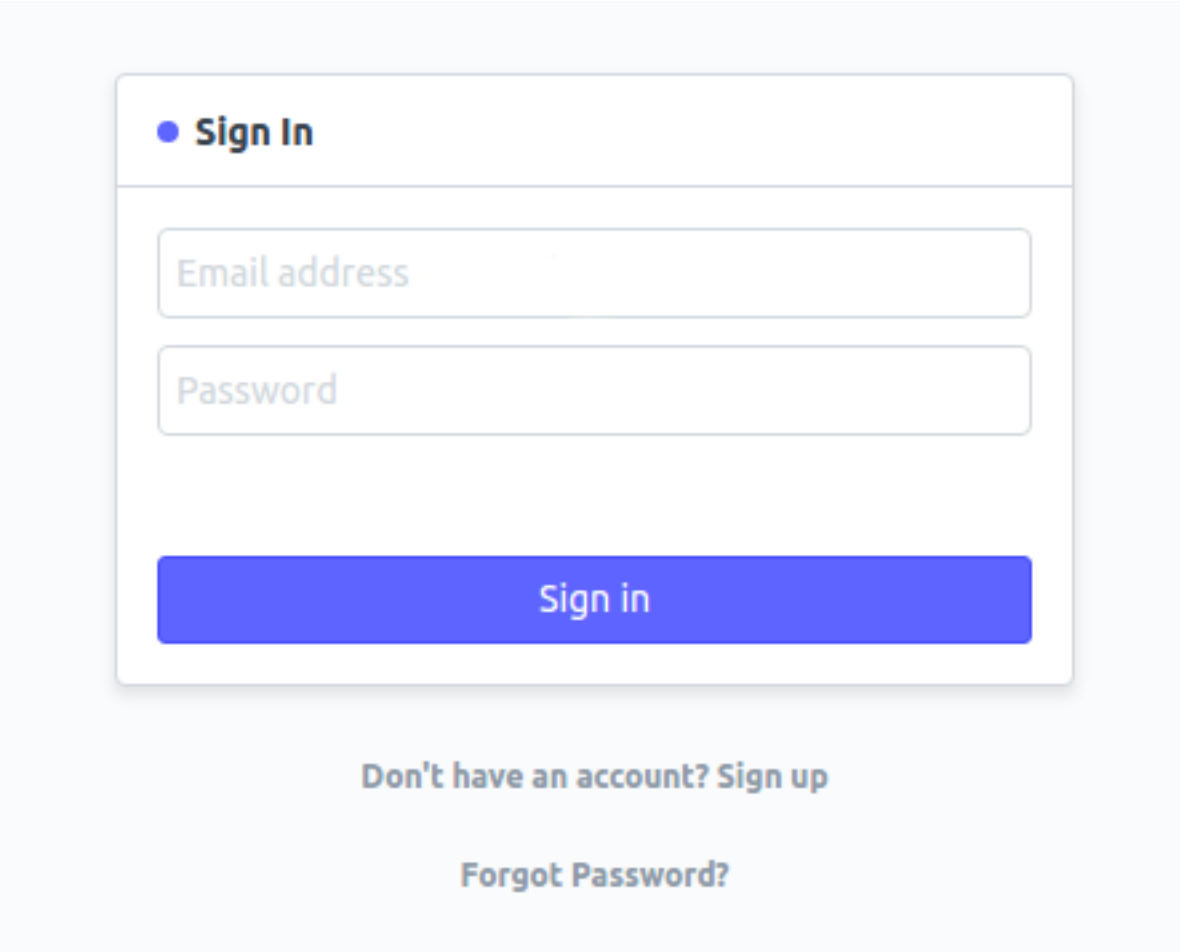
- **Reset Password**: An email with instructions to reset the user's password will be sent to the user's Email Account.
- **Reset OTP Secret**: Reset OTP Secret for logging in via Two Factor Authentication.

Create User Email will let you create an Email Account for the user based on the email entered in the User master.

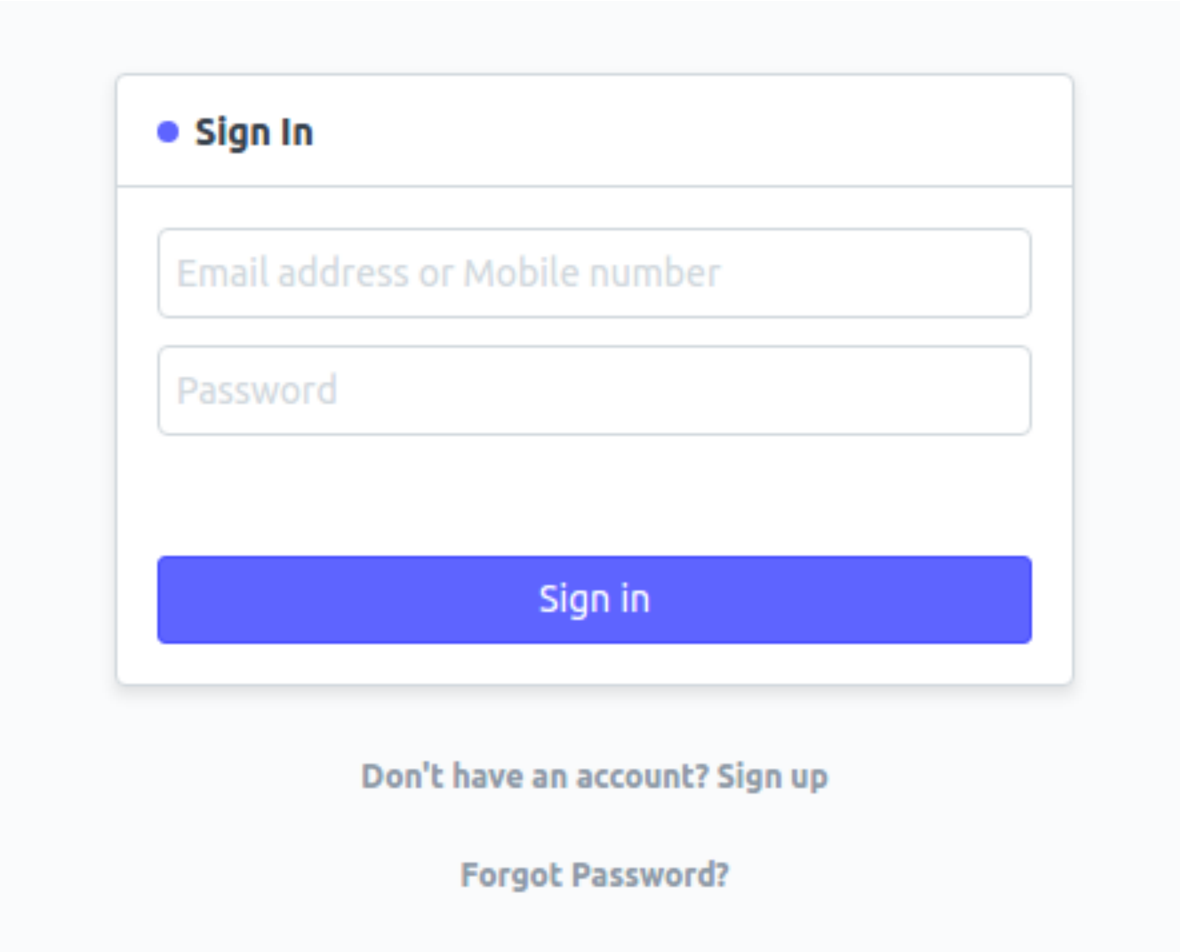
3. Login Methods

In System Settings, under the Security section, if you check the 'Allow Login using Mobile No' checkbox, a mobile number can also be used to log in. While a Mobile No will be unique, it will not be treated as a user ID.

Login with Email:



Login with Email or Mobile:



After adding these details, save the user.

➢ Users And Permissions

In ERP, you can create multiple users and assign them different roles.

A role is a set of permissions assigned to a user so that they can access the documents they need to. For example, a sales employee will need access to sales transactions but will not have access to approve leaves.

Some users can only access the public-facing part of ERP (i.e. a portal view). Such users are called "Website Users". "System Users" will have access to modules and can access documents as per the roles set.

ERP implements permission control at the User and Role level. Each user in the system can be assigned multiple roles and permissions. The most important role is "System Manager". Any user having this role can add other users and set roles for all users.

➢ Role and Role Profile

A Role defines the permissions for accessing various documents in ERP.

Roles define a set of permissions which can be set from the [Roles Permission Manager]. Most commonly used roles are already defined in ERP, you can use the system with them. If needed, you can add more roles. For example, if you assign the Sales User role to a user, they'll be able to access documents like Quotations and Sales Orders since the permissions are already set for the role Sales User.

Role profiles store different roles so that multiple roles can be assigned at once.

Role Profiles act as a template to store and select multiple roles. This Role Profile can then be assigned to a [User]. For example, a Sales Supervisor will have the roles Employee, Sales Manager, Sales User, and Sales Master Manager. Role Profiles are useful to assign multiple roles at once when adding multiple employees.

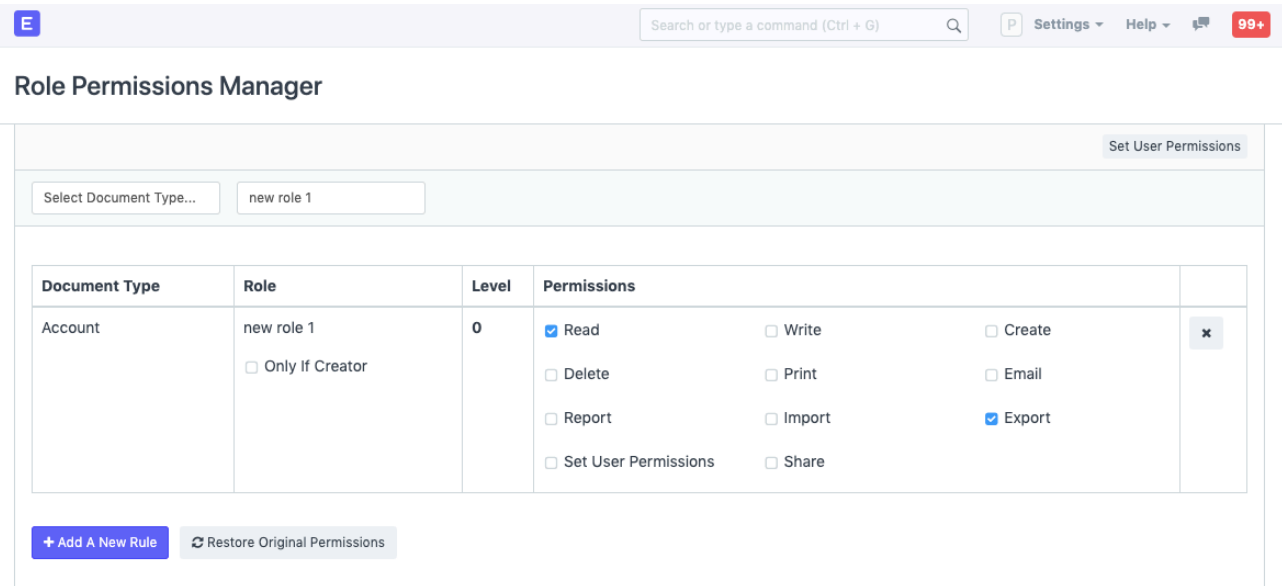
To access Role, go to:

Home > Users and Permissions > Role

1. How to add a Role

1. Go to the Role list, click on New.
2. Enter a name for the Role.
3. Choose whether the Role has desk access. A role that has desk access can access ERP modules and the company's documents. The level of access depends on the roles assigned to the user.
4. Save.

You can add two factor authentication for the role and also restrict it to a specific domain. From here, you can go to the Roles Permission Manager and set permissions for the role across different DocTypes.

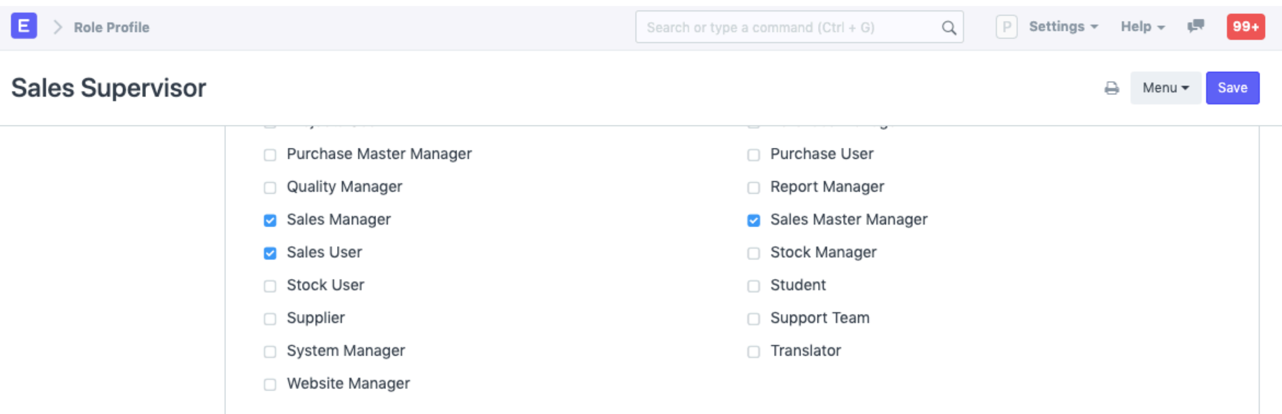


2. How to add a Role Profile

To access Role Profile, go to:

Home > Users and Permissions > Permissions > Role Profile

1. Go to the Role Profile list, click on New.
2. Enter a name.
3. Select the roles you want to assign to this profile.
4. Save.



➢ **Role Based Permissions**

Permission to different documents can be controlled using Role Based Permissions.

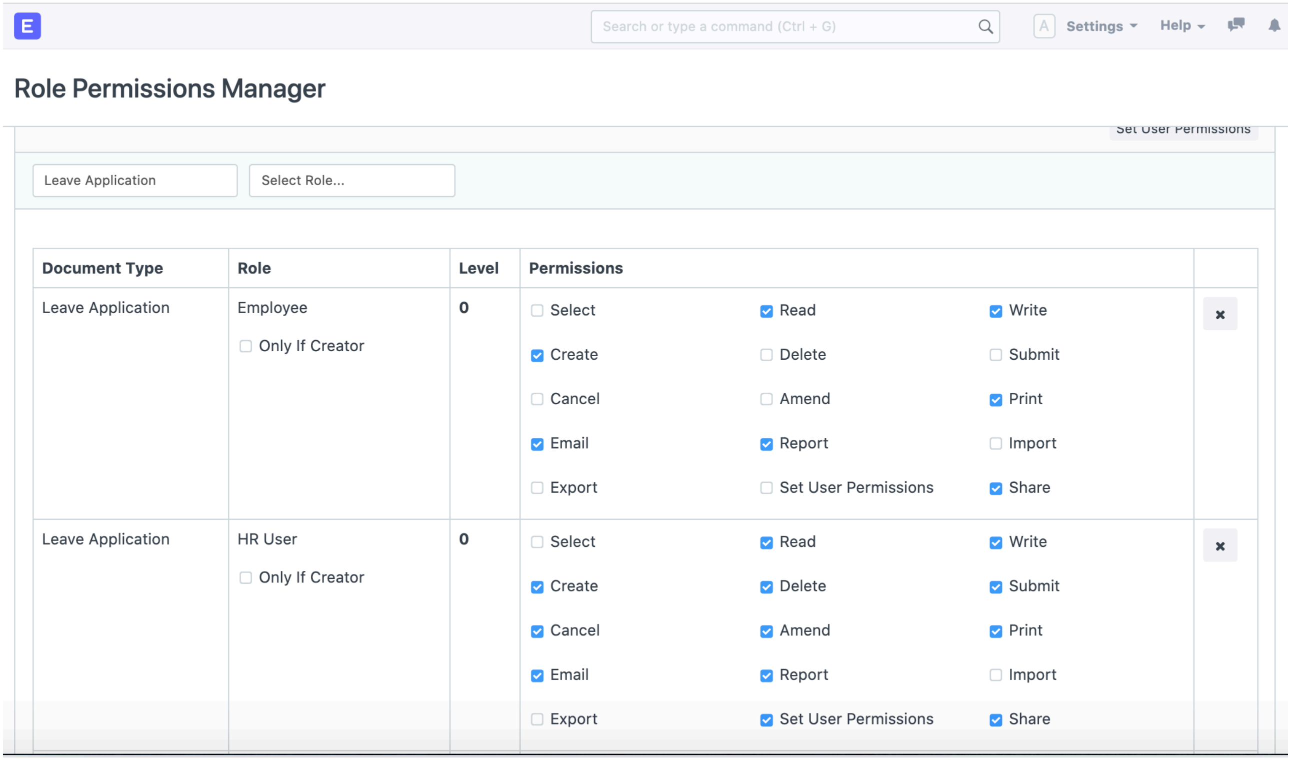
ERP has a role-based permission system. It means that you can assign Roles to Users, and Permissions can be set on Roles. The Role Permissions Manager allows you to set which roles can access which documents and with what permissions (read, write, submit, etc.).

Once roles are assigned to a user, their access can be limited to specific documents. The permission structure allows you to define different permission rules for different fields using a concept called **Permission Level** of a field.

1. How to use the Role Permissions Manager

To start using the Role Permission Manager, go to:

Home > Users and Permissions > Role Permissions Manager



Permissions are applied on a combination of:

- **Roles:** As we saw earlier, Users are assigned Roles and it is on these Roles that permission rules are applied. For example, a sales user may be given the roles of an Employee and a Sales User.

Examples of Roles include Accounts Manager, Employee, HR User, etc.

- **Document Types:** Each type of document, master or transaction, has a separate list of role-based permissions as seen in the preceding screenshot.

Examples of Document Types are Sales Invoice, Leave Application, Stock Entry, etc.

- **Permission Levels:** In each document, you can group fields by "levels". Each group of fields is denoted by a unique number (0 to 9). A separate set of permission rules can be applied to each field group. By default, all fields are of level 0.

Permission "Level" connects fields with level X to a permission rule with level X. To know more click here.

- **Document Stages:** Permissions are applied on each stage of the document like Creation, Saving, Submission, Cancellation, and Amendment. A role can be permitted to Print, Email, Import or Export data, access Reports, or define User Permissions.
- **User Permissions:** Using User Permissions in ERP a user can be restricted to access only specific Documents for that Document Type. Eg: Only one Territory from all Territories. User Permissions defined for other Document Types also get applied if they are related to the current Document Type through Link Fields.

For example, a Customer is a link field in a Sales Order or Quotation. In the Role Permissions Manager, User Permissions can be set using the 'Set User Permissions' button.

To set User Permissions based on documents/fields go to:

Home > Users and Permissions > Permissions > User Permissions

- **Add a New Rule**: In the Role Permissions Manager, to add a new rule, click on the **Add a New Rule** button and a pop-up box will ask you to select a Role and a Permission Level. Once you select this and click on 'Add', this will add a new row to your rules table.

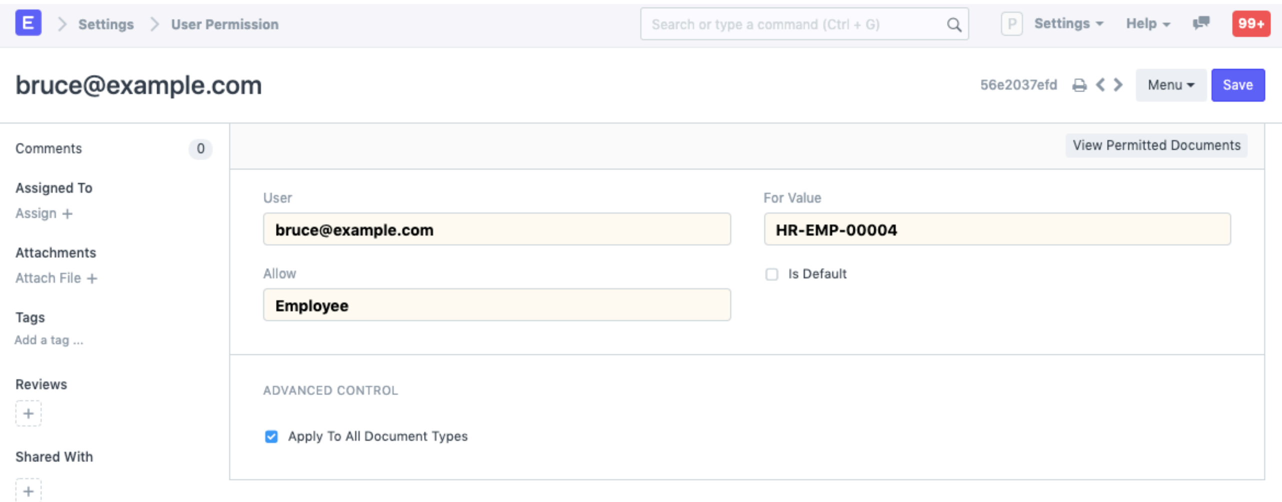
2. How Role Based Permissions Work

Leave Application is a good example that encompasses all areas of a Permission System.

- It should be created by an Employee. For this, Employee Role should be given Read, Write, Create permissions.

Document Type	Role	Level	Permissions			
Leave Application	Employee	0	[ ] Select	[x] Read	[x] Write	×
	[ ] Only If Creator		[x] Create	[ ] Delete	[ ] Submit	
			[ ] Cancel	[ ] Amend	[x] Print	
			[x] Email	[x] Report	[ ] Import	
			[ ] Export	[ ] Set User Permissions	[x] Share	

- An **Employee** should only be able to access his/her Leave Application. Hence, User Permissions record should be created for each User-Employee combination.



- If you want an **Employee** to only select a document in another document and not have read access to that document as a whole, then grant only Select perm to the role, Employee.

Leave Type | Employee

Document Type	Role	Level	Permissions			
Leave Type	Employee	0	[x] Select	[ ] Read	[ ] Write	×
	[ ] Only If Creator		[ ] Create	[ ] Delete	[ ] Print	
			[ ] Email	[ ] Report	[ ] Import	
			[ ] Export	[ ] Set User Permissions	[ ] Share	

+ Add A New Rule | Restore Original Permissions

- **HR Manager** should be able to see all Leave Applications. Create a Permission Rule for HR Manager at Level 0, with Read permissions. Apply User Permissions should be disabled.

Document Type	Role	Level	Permissions
Leave Application	HR Manager [ ] Only If Creator	0	[ ] Select, [x] Read, [x] Write, [x] Create, [x] Delete, [x] Submit, [x] Cancel, [x] Amend, [x] Print, [x] Email, [x] Report, [ ] Import, [x] Export, [x] Set User Permissions, [x] Share

- **Leave Approver** should be able to see and update Leave Applications of employees under him/her. Leave Approver is given Read and Write access at Level 0. Relevant Employee Documents should be enlisted in the User Permissions of Leave Approvers. (This effort is reduced for Leave Approvers mentioned in Employee Documents, by programmatically creating User Permission records).

Leave Application	Leave Approver [ ] Only If Creator	0	[ ] Select, [x] Read, [x] Write, [ ] Create, [x] Delete, [x] Submit, [x] Cancel, [x] Amend, [x] Print, [x] Email, [x] Report, [ ] Import, [ ] Export, [ ] Set User Permissions, [x] Share

- It should be Approved/Rejected only by HR User or Leave Approver. The Status field of a Leave Application is set at Level 1. HR User and Leave Approver are given Read and Write permissions for Level 0, while everyone else (All) are given Read permission for Level 1.

E | Search or type a command (Ctrl + G) | P | Settings | Help | 99+

Role Permissions Manager

Leave Application	Leave Approver	1	[x] Read, [x] Write
Leave Application	All	1	[x] Read, [ ] Write
Leave Application	HR User	1	[x] Read, [x] Write

+ Add A New Rule | Restore Original Permissions

- **HR User** should be able to delegate Leave Applications to his/her subordinates. HR User is given the right to Set User Permissions. A User with HR User role would be able to define User Permissions on Leave Application for other users.

Leave Application	HR User [ ] Only If Creator	0	[x] Read, [x] Write, [x] Create, [x] Delete, [x] Submit, [x] Cancel, [x] Amend, [x] Print, [x] Email, [x] Report, [ ] Import, [ ] Export, [x] Set User Permissions, [x] Share

In case you have correctly assigned the roles but still you're getting errors when accessing documents, refer this page.

➢ User Permissions

User permissions is a way of restricting user access to particular documents.

Role based permissions allow setting complete (by default) access to a document type (doctype) like Sales Invoice, Orders, Quotation, etc. This means that when you assign a Sales User role to a user, they can access all the Sales Orders and Quotations.

User Permissions can be used to restrict access to select documents based on the link fields in the document. For example, consider that you do business with multiple territories and you want to restrict access of certain Sales Users to Quotations/Sales Order belonging to a particular territory. This can be done via User Permissions. The restrictions can be set on Customer, Supplier, Customer Group, Supplier Group, etc.

Setting User Permissions are particularly useful when you want to restrict based on:

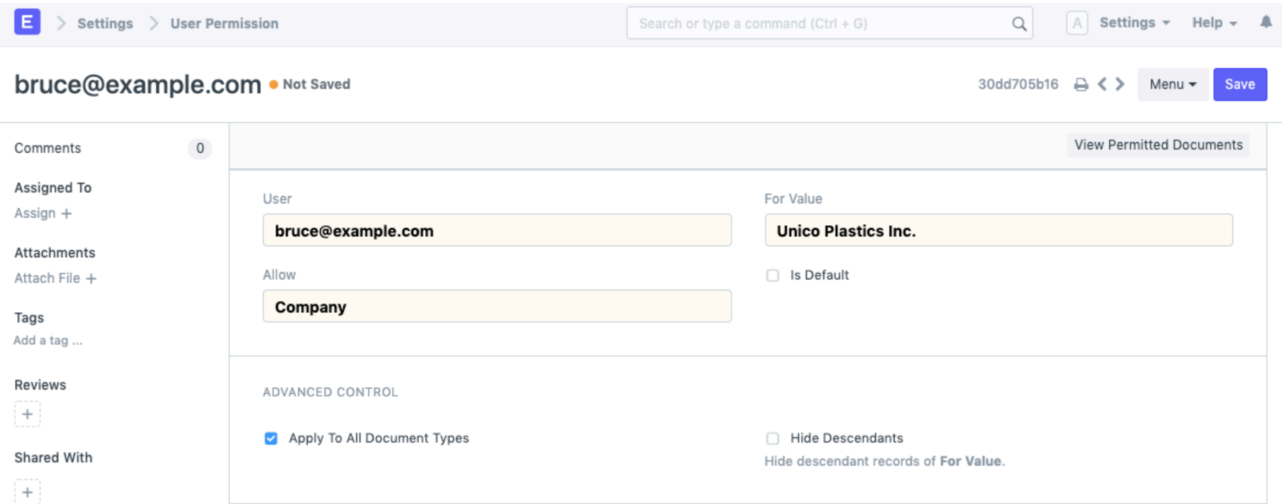
1. Allowing user to access data belonging to one Company
2. Allowing user to access data related to a specific Customer or Territory

To access User Permissions, go to:

Home > User and Permissions > User Permissions

1. How to create User Permissions

1. Go to the User Permissions list, click on New.
2. Select the user for which the rule has to be applied.
3. Select the type of document to be allowed (for example "Company").
4. Under For Value, select the specific item that you want to allow (the name of the "Company).
5. If you check 'Is Default', the value selected in 'For Value' will be used by default for any future transactions by this user. That is if company 'Unico Plastics Inc.' is selected as 'For Value', this Company will be set as default for all future transactions by this user.



Note: Only a single user permission can be set as default for a particular document type for a specific user.

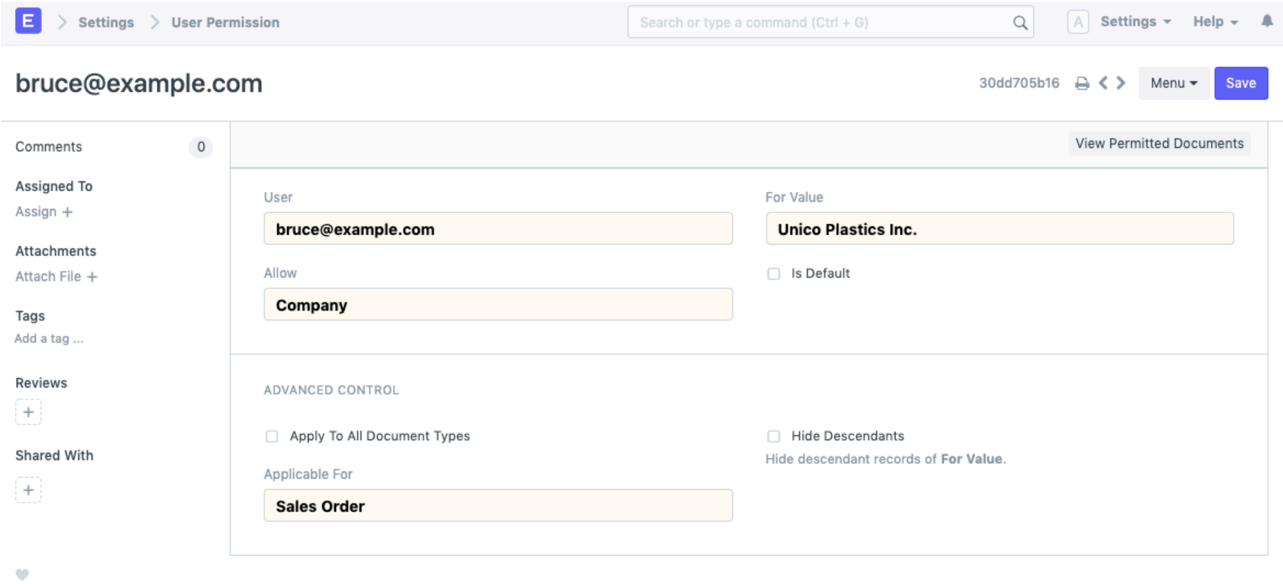
2. More User Permission actions

2.1 Advanced Control

In Advanced Control, you can have better command over where the User Permission is applied.

2.1.1. Applicable For

You can optionally apply user permissions only for specific document type by setting the Document Type after unchecking the Apply To All Document Types checkbox. Setting **Applicable For** option will make the current user permission applicable only under the selected Document Type master.



In the above User Permission, the user will be able to access only Sales Orders of the selected company.

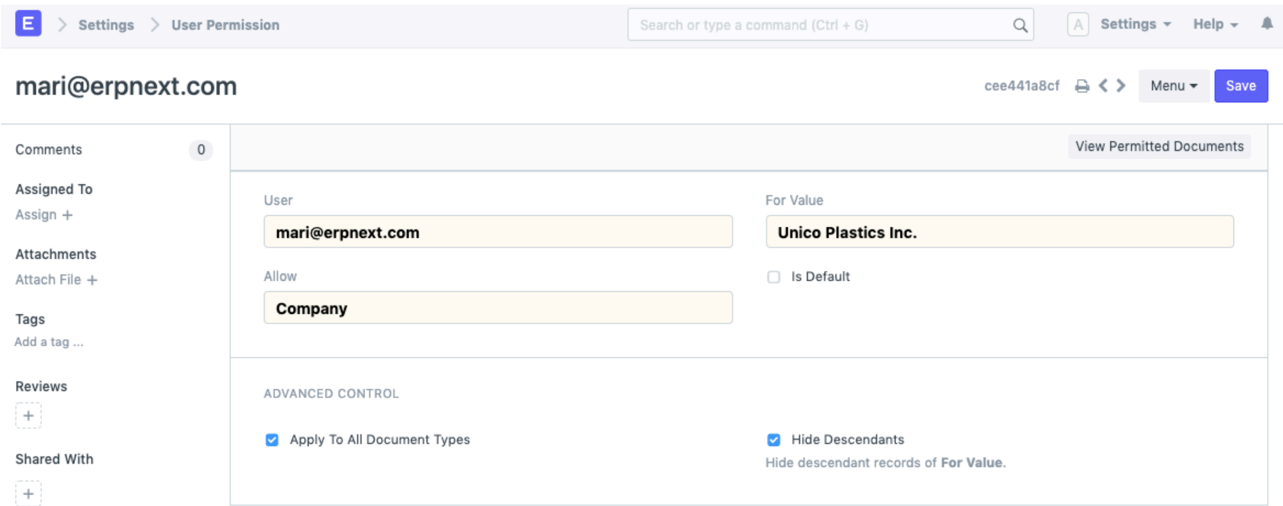
Note: If **Applicable For** is not set, User Permission will apply across all related Document Types.

2.1.2. Hide Descendants

The value of **Allow** could be a DocType with a Tree View, which will have records with a parent-child or ancestor-descendant relationship.

Let's assume **For Value**, 'Unico Plastics Inc.', has a child company 'Unico Toys'. When a User Permission is created for 'Unico Plastics Inc.', permissions for its descendants are granted as well.

Hide Descendants is visible only on selecting a Tree View DocType. By enabling this checkbox, permissions for descendants of **For Value** will not be granted.

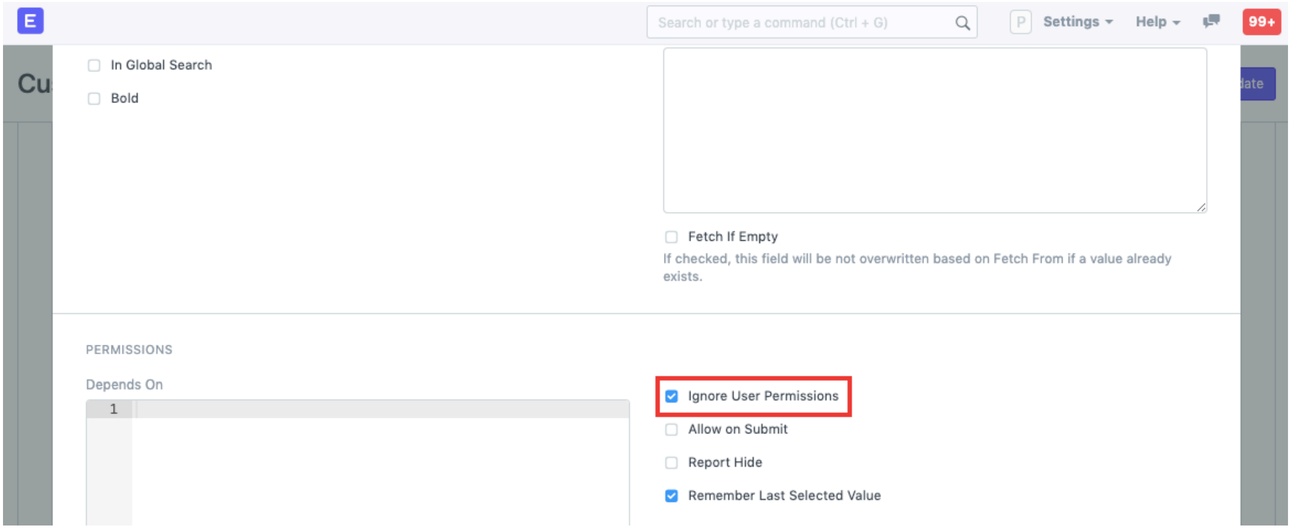


A user that can view records of 'Unico Plastics Inc.' will not be able to view those of 'Unico Toys'.

2.2 Ignoring User Permissions on Certain Fields

Another way of allowing documents to be seen by everyone that have been restricted by User Permissions is to tick "Ignore User Permissions" on a particular field by going to **Customize Form**.

For example, you don't want Assets to be restricted for any user, then select **Asset** in form type. Under the fields table, expand the Company field and tick on "Ignore User Permissions".



2.3 Strict Permissions

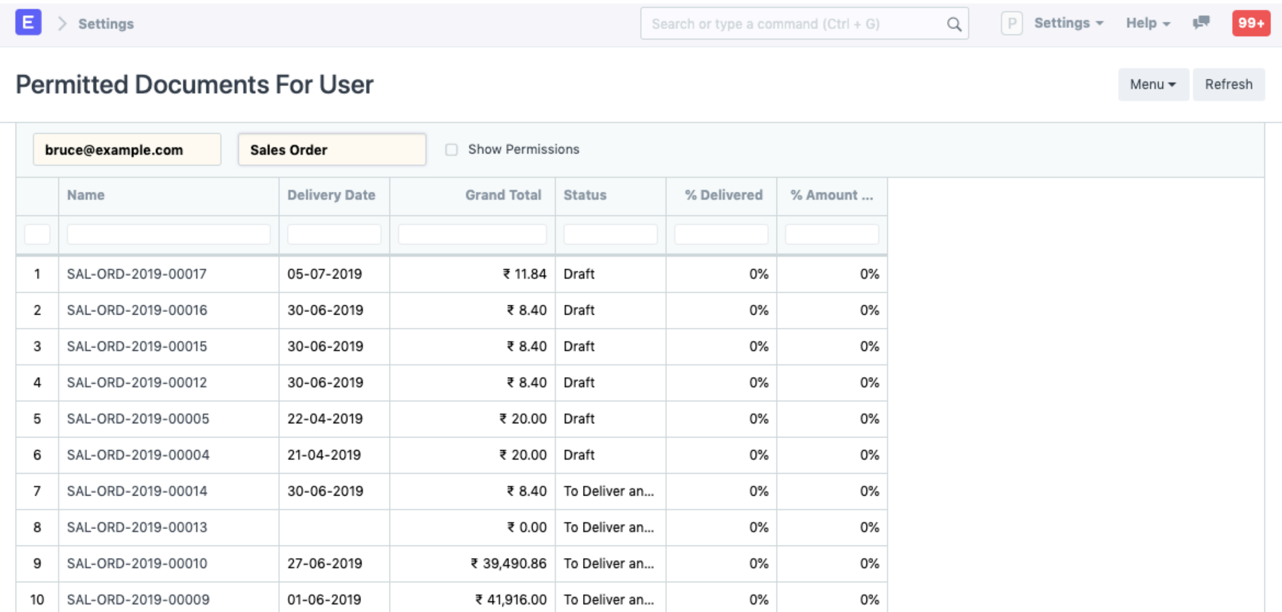
This restricts user access to documents in a stricter way.

To know more, go to the System Settings page.

2.4 Checking How User Permissions are Applied

Finally, once you have created your air-tight permission model, and you want to check how it applies to various users. You can see it via the **Permitted Documents for User** report. Using this report, you can select the **User** and document type and view which documents a particular user can access.

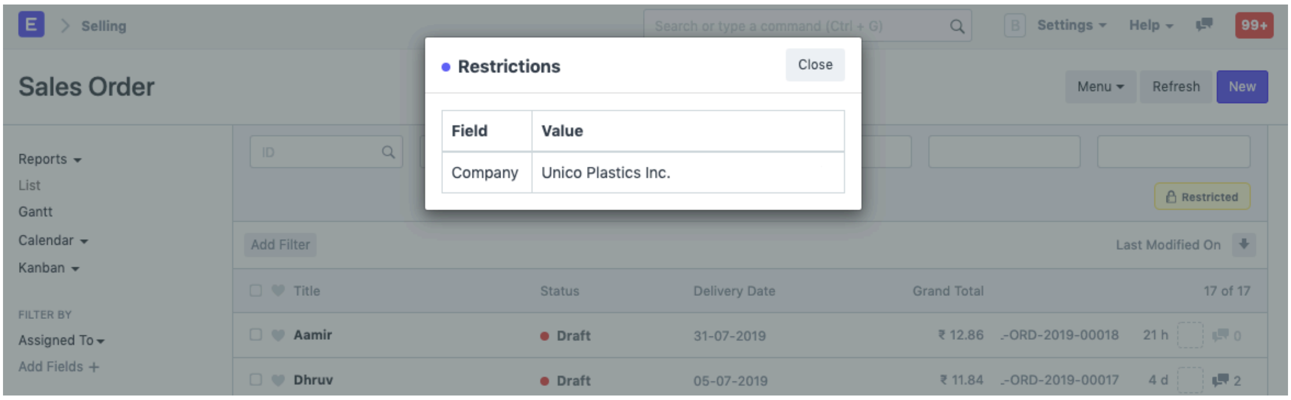
Ticking on the Show Permissions checkbox will show the read/write/submit and other access levels.



	Name	Delivery Date	Grand Total	Status	% Delivered	% Amount ...
1	SAL-ORD-2019-00017	05-07-2019	₹ 11.84	Draft	0%	0%
2	SAL-ORD-2019-00016	30-06-2019	₹ 8.40	Draft	0%	0%
3	SAL-ORD-2019-00015	30-06-2019	₹ 8.40	Draft	0%	0%
4	SAL-ORD-2019-00012	30-06-2019	₹ 8.40	Draft	0%	0%
5	SAL-ORD-2019-00005	22-04-2019	₹ 20.00	Draft	0%	0%
6	SAL-ORD-2019-00004	21-04-2019	₹ 20.00	Draft	0%	0%
7	SAL-ORD-2019-00014	30-06-2019	₹ 8.40	To Deliver an...	0%	0%
8	SAL-ORD-2019-00013		₹ 0.00	To Deliver an...	0%	0%
9	SAL-ORD-2019-00010	27-06-2019	₹ 39,490.86	To Deliver an...	0%	0%
10	SAL-ORD-2019-00009	01-06-2019	₹ 41,916.00	To Deliver an...	0%	0%

Note: If you cannot access Sales Order or any other document type in this list, make sure you've set the roles correctly.

For example, the user, Bruce is restricted to Company 'Unico Plastics Inc.'



➢ Role Permission for Page and Report

Access to different pages and reports can be controlled in Role Permission for Page and Report.

Document types are Sales Order, Customer, Supplier, etc. They are a **document type** meaning they can contain multiple documents of that type. A Page is a single page like Selling Settings. You cannot create multiple Selling Settings, but you can create multiple Sales Orders.

In ERP, user can make a custom user interface using Page and a custom report using Report Builder or Query Report. ERP has a role-based permission system where you can assign roles to the user. The same role can be assigned to the page and report to access them.

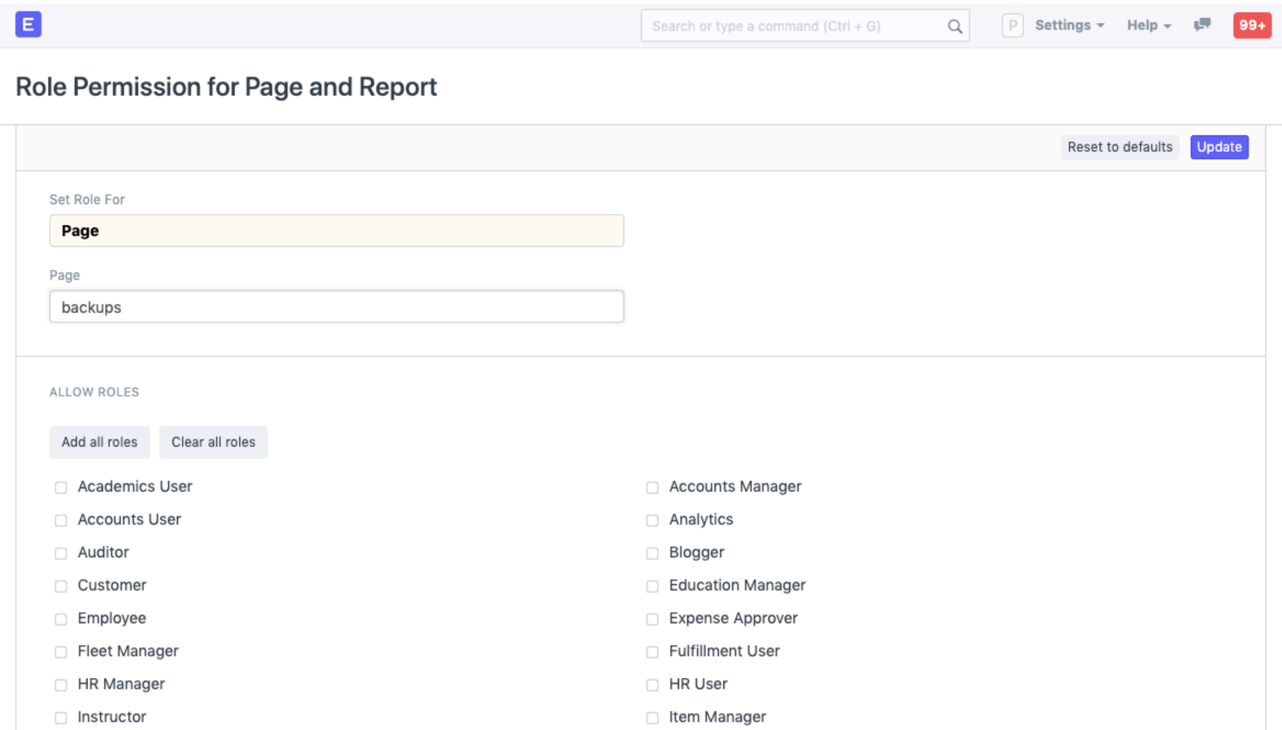
If the user has enabled developer mode, then they can add the roles directly in the page and report record. In that case, the permissions will also be reflected in the JSON file for the page/report. Consider you want to restrict the roles that can access certain pages and reports in ERP, this can be done via the Role Permission for Page and Report.

To access Role Permission for Page and Report, go to:

Home > Users and Permissions > Role Permission for Page and Report

1. How to use Role Permission for Page and Report Tool

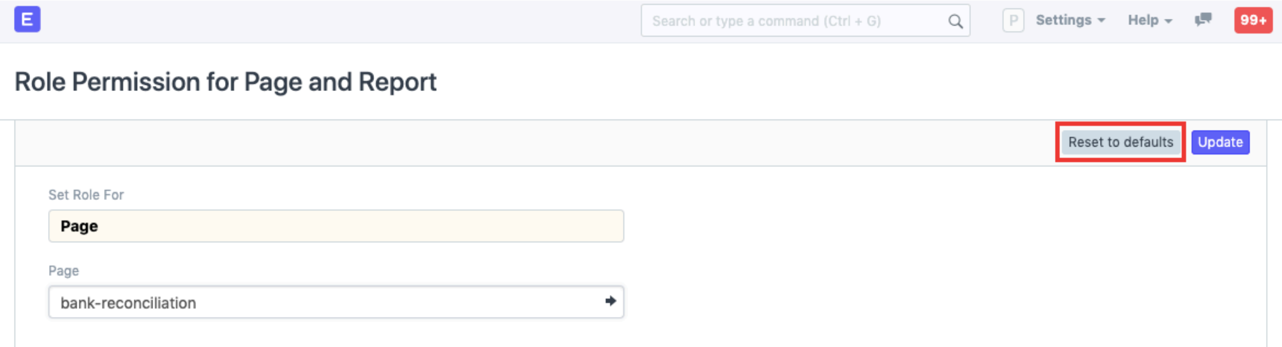
If developer mode is disabled, the user can assign the roles to the page and report, using "Role Permission for Page and Report" page.



1.1 Reset to defaults

Using the "Reset to Defaults" button, the user can remove the custom permissions applied on a page or report. Then default permissions will

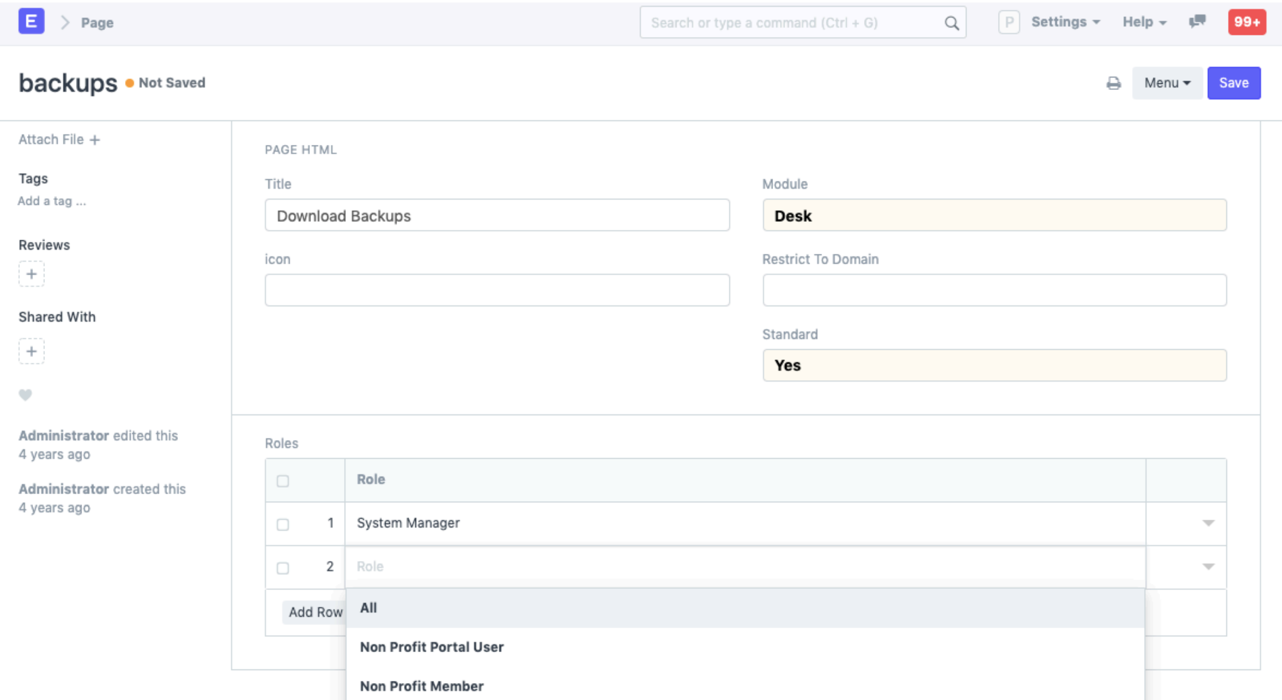
be applicable on that page or report.



Setting Role Permissions from the Page/Report as a Developer

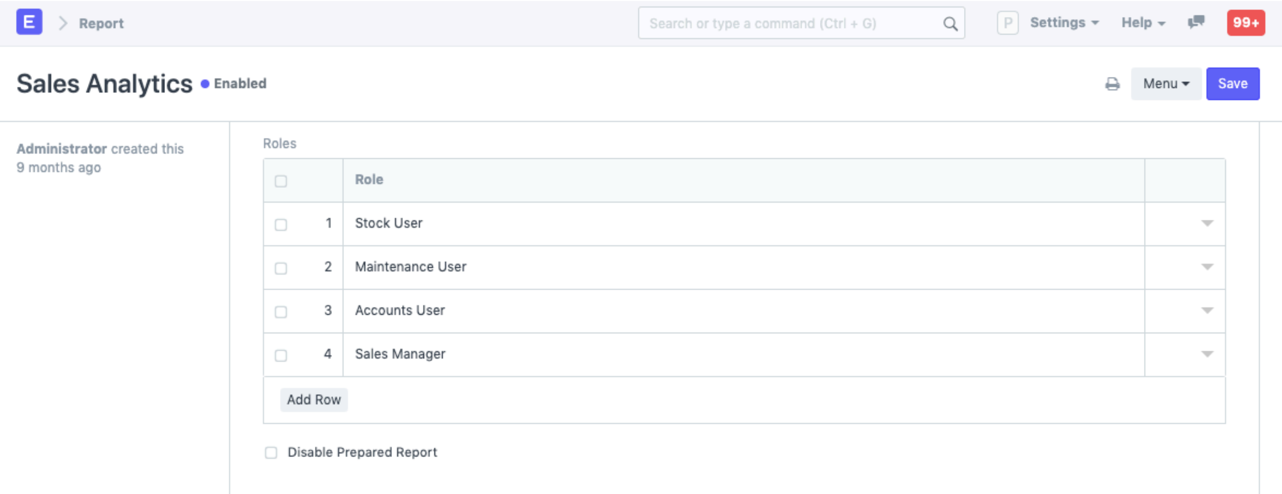
Role Permissions For Page

1. Go to: Home > Developer > Page.
2. Add a row and select which other roles can access the Page.



Role Permissions For Report

1. Go to: Home > Developer > Report.
2. Add rows with roles who can access the Report.

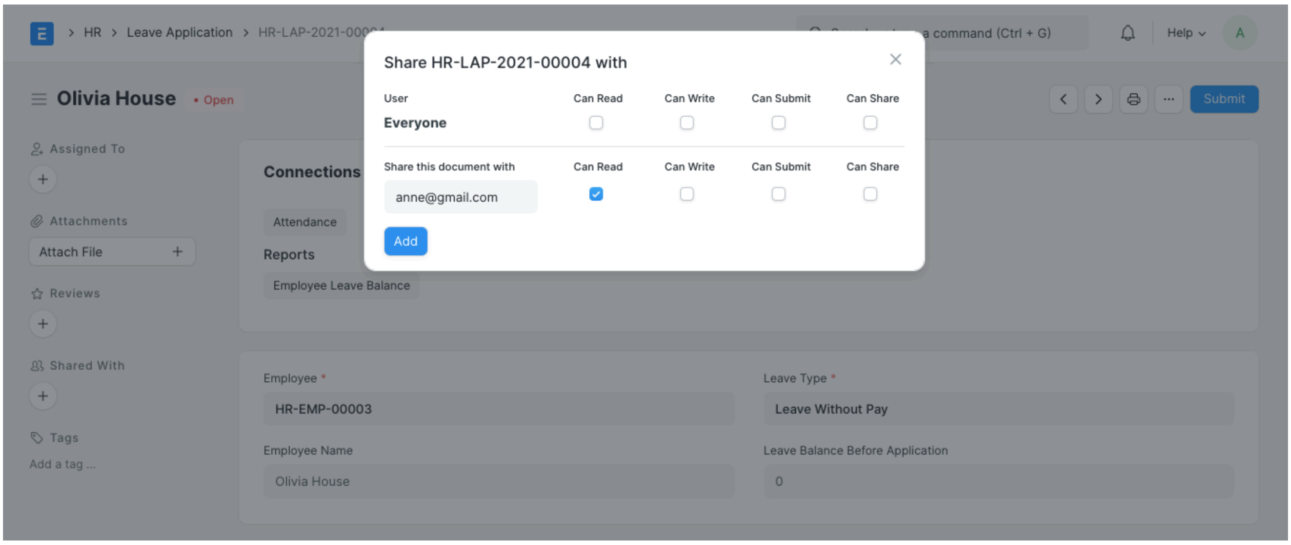


➢ Sharing

You can share documents with other users via sharing in ERP.

In addition to user and role permissions, you can also share a document with another user if you have sharing rights for that document. Note that, a shared document will be visible to the other user even if the document is restricted via User Permissions.

To share a document, open the document, click on the "+" icon under sharing and select the user with whom you want to share:



In the popup window, you can either select all users or one particular user.

Read, write, submit, and share access can be granted to the user for this document.

➢ Limited User

The user will get limited access to the system.

Limited users can access only specific documents of the specific modules. Certain users don't use all the modules and need only specific modules. For example, in the company, to record the daily attendance or leave application every employee was given required system access. But assume 500 people are working in the company out of which only 100 use all documents and the remaining 400 need only documents for daily attendance or leave applications. Such users are limited users.

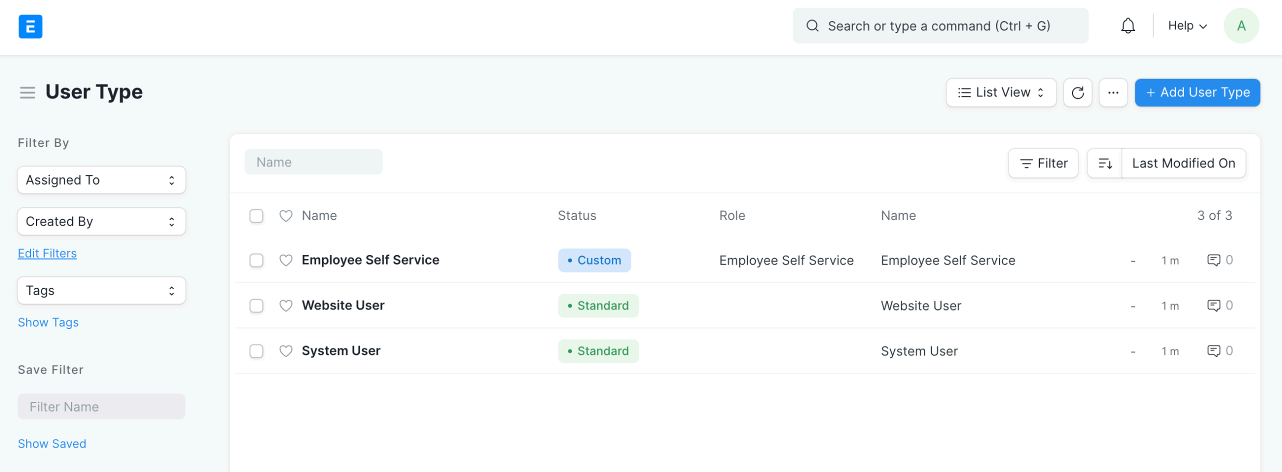
The User Type document plays an important role to handle this use case. There are default User Types, "System User" and "Website User", the System User can access the desk and website portal whereas the Website User can only access the website portal. To handle the case of

limited access of documents for the employees by default ERP has added a new user type 'Employee Self Service'.

User Type

To access the User Type document, go to:

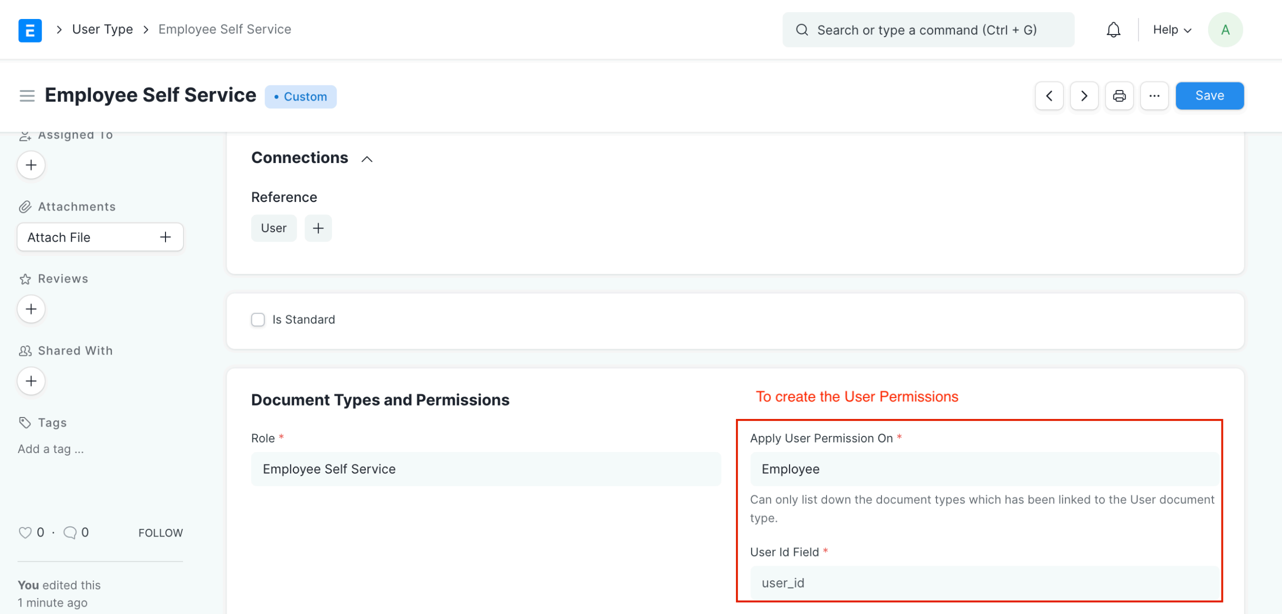
Users > User Type



Website User and System User will be standard user types and these cannot be deleted or edited. However, non-standard (Custom) user types can be deleted, created, edited. By default, delete rights are not given to any user.

Non-Standard User Type

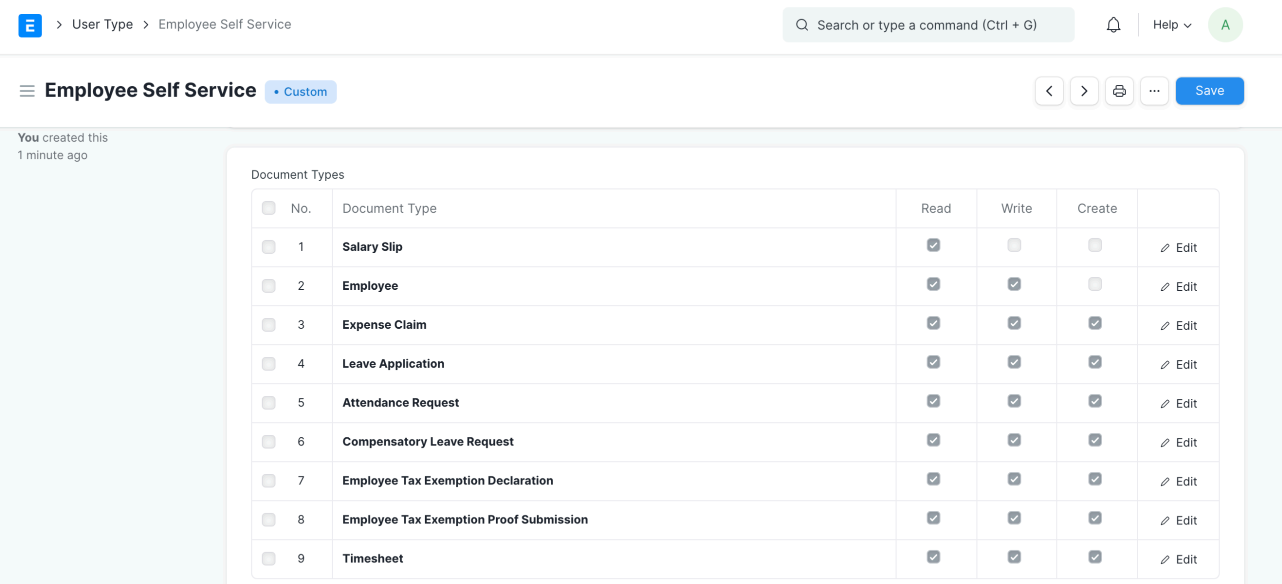
1) For the non standard user type, user has to select the Custom Role, document on which they want to apply the user permission, and the fieldname of the user.



In the above image, Employee has the link field User ID which is linked to the User document. As the "Apply User Permission on" has been set as "Employee", then the respective employee's user can only view the documents in which the respective employee field is linked. For example, the employee can only able to view the salary slip which has been created against their employee id.

2) Document Types:

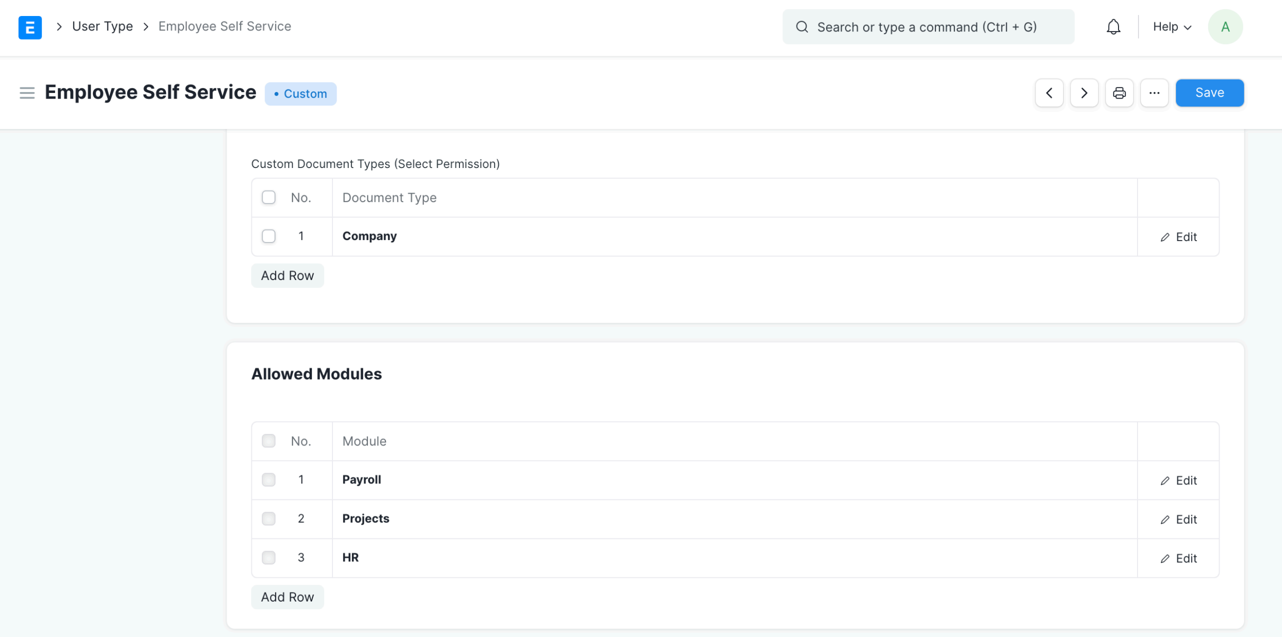
The non-standard user type users can only access the documents which have been mentioned in the user type.



The above table also acts as the Role Permission Manager for this particular User Type (Employee Self Service in our case). Employee Self Service as a role won't be accessible in the general Role Permission Manager.

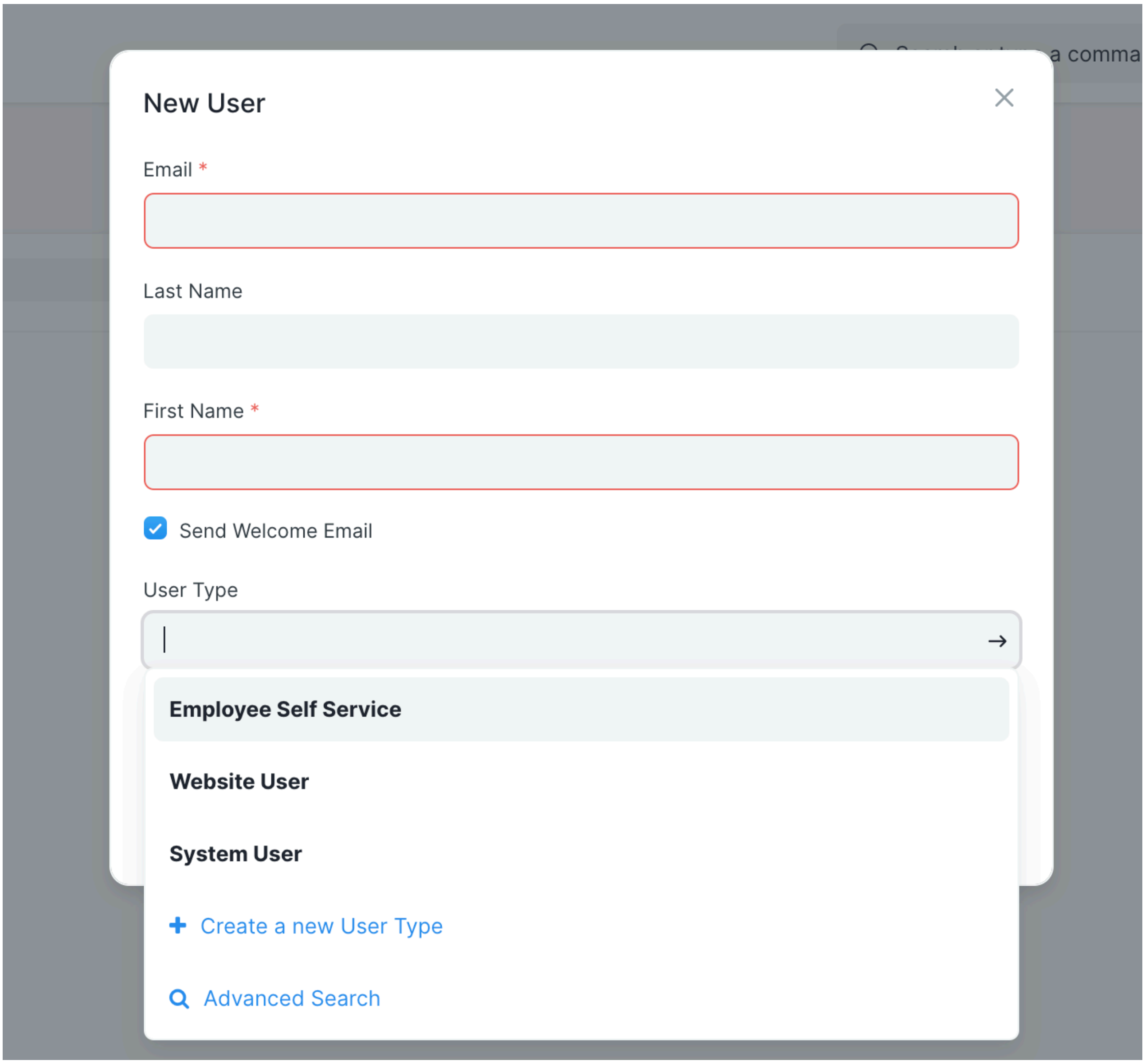
3) Document Types (Select Permissions Only):

In this table, you need to list down all the doctypes that you want the Employee Self Service User to have SELECT access to. There is no limit to the number of doctypes you can add here. Users will not be able to create the records for the documents to which they have Select perm access.



Adding non-standard User

While adding the new user, the user needs to select the user type. In case of a non-standard user type, the respective user should be linked to the document which has been set in the field "Apply User Permission On".



➢ **Administrator**

The administrator is above the System Manager and has all the rights and permissions for an ERP account.

A System Manager also has permissions to most items in the system, but the Administrator has unrestricted access.

PRINTING

➢ Printing and Branding

Documents that you send to your customers carry your brand and image and they must be tailored to your requirements. ERP gives you many options so that you can set your oraganization's branding in your documents.

ERP also gives you the option to print barcode labels, POS receipts and send other raw commands to printers using the Raw Printing feature.

Topics

- print-settings
- print-format-builder
- print-style
- print-headings
- letter-head
- address-template
- terms-and-conditions
- cheque-print-template
- custom-translations
- raw-printing

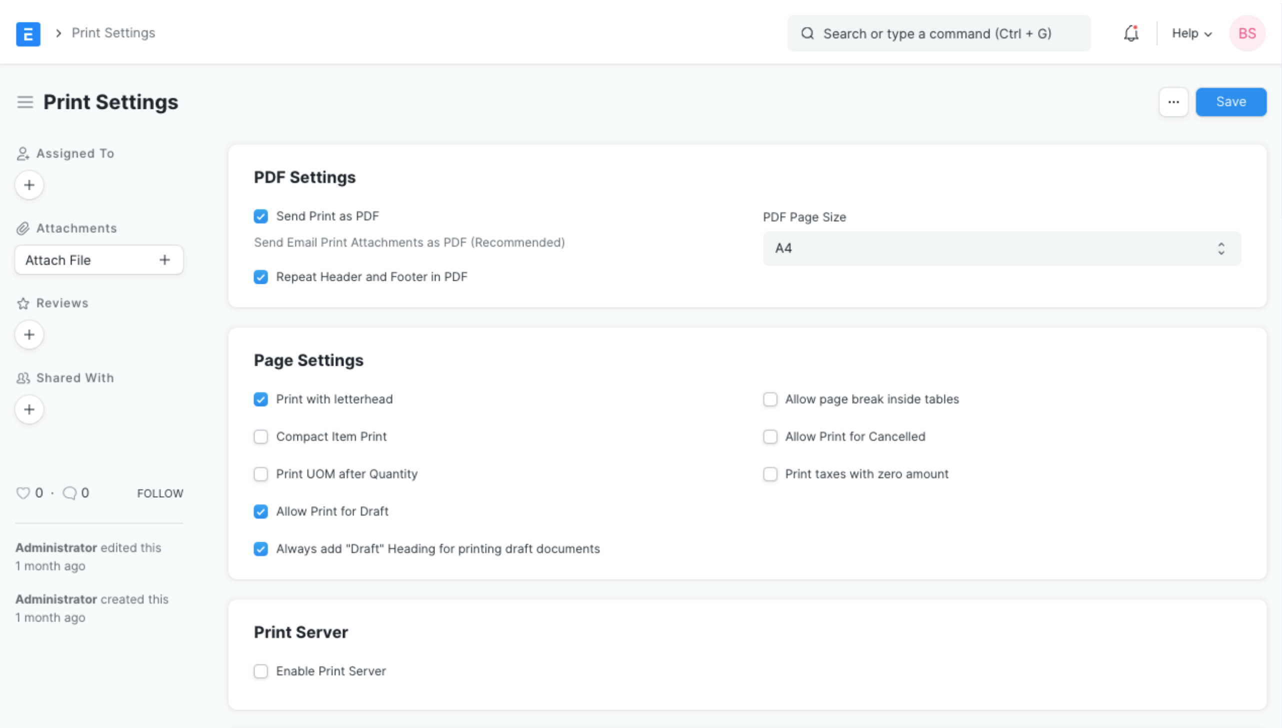
➢ Print Settings

In Print Settings you can set your printing preferences like Paper Size, default text size, whether you want to output as PDF or HTML, etc.

Since ERP is a browser-based application, the actual print command is executed by the browser you're using.

To edit Print Settings, go to:

Home > Settings > Print Settings



There are various configurations available in the Print Settings. Let's learn about them.

1. PDF Settings

1.1 PDF or HTML

When you email any document (like Sales Order/Invoice) from ERP, it is sent in the PDF or HTML format. The file is sent in PDF by default. If you wish to send a document in the HTML format, just uncheck the option "Send Print as PDF".

1.2 Repeat Header and Footer in PDF

The letterhead is a master where you can define the standard Header and Footer which is appended to the document's Print Format. If this property is enabled, then Header and Footer are added to each page. If you don't want header and footer repeat on each page, just disable this setting.

1.3 PDF Page Size

The default size for printing PDF pages is A4, and you can choose any size from the options defined [here](), including custom dimensions defined in millimeters.

2. Page Settings

2.1 Print With Letterhead

Enabling this property will automatically tick the Letter Head option when printing a document. Note that you need to either set Letter Head as default or select one in the transaction for it to appear in the print view.

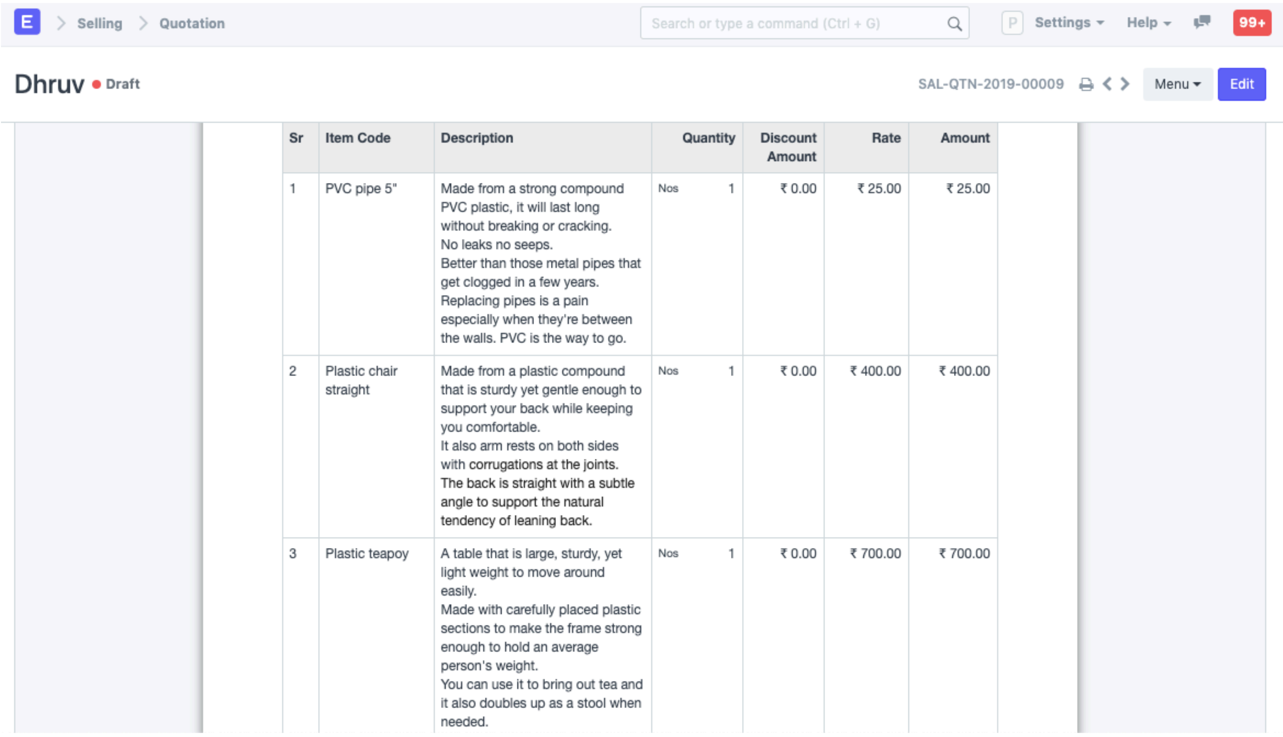
2.2 Compact Item Print

Transactions like sales orders/invoices have a table detailing items bought or sold. It has multiple columns like Item Name, Description, UoM, Rate Amount, etc. If there are many columns in the Item table, then Print Format looks bit cluttered. You can improve the view of the table by enabling Compact Item Print.

As per this setting, there will be only four columns in the Print Format, namely: Description, Qty, Rate, and Amount.

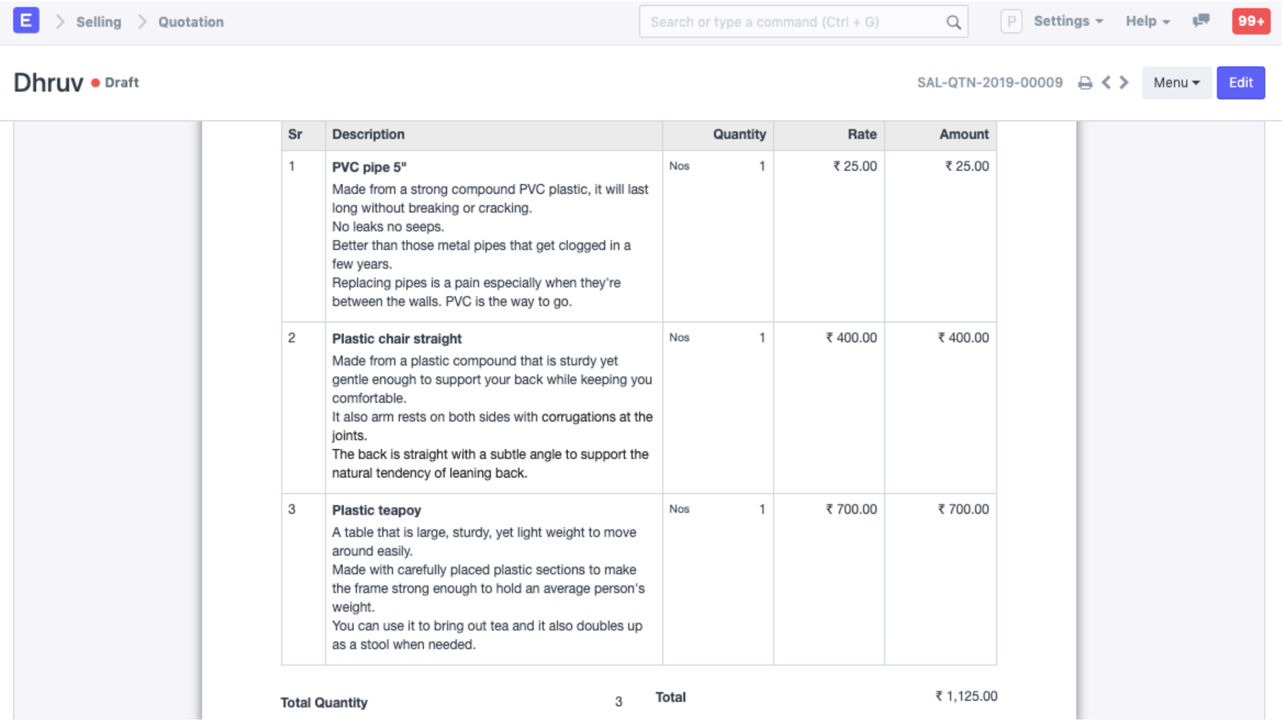
The values of other columns (like name, description, image, serial nos. etc.) are concatenated in the Description column.

When the checkbox is unticked, the print format looks like this:



Sr	Item Code	Description	Quantity		Discount Amount	Rate	Amount
1	PVC pipe 5"	Made from a strong compound PVC plastic, it will last long without breaking or cracking. No leaks no seeps. Better than those metal pipes that get clogged in a few years. Replacing pipes is a pain especially when they're between the walls. PVC is the way to go.	Nos	1	₹ 0.00	₹ 25.00	₹ 25.00
2	Plastic chair straight	Made from a plastic compound that is sturdy yet gentle enough to support your back while keeping you comfortable. It also arm rests on both sides with corrugations at the joints. The back is straight with a subtle angle to support the natural tendency of leaning back.	Nos	1	₹ 0.00	₹ 400.00	₹ 400.00
3	Plastic teapoy	A table that is large, sturdy, yet light weight to move around easily. Made with carefully placed plastic sections to make the frame strong enough to hold an average person's weight. You can use it to bring out tea and it also doubles up as a stool when needed.	Nos	1	₹ 0.00	₹ 700.00	₹ 700.00

This is what the Compact Print Format looks like:



Sr	Description	Quantity	Rate	Amount
1	**PVC pipe 5"** Made from a strong compound PVC plastic, it will last long without breaking or cracking. No leaks no seeps. Better than those metal pipes that get clogged in a few years. Replacing pipes is a pain especially when they're between the walls. PVC is the way to go.	Nos 1	₹ 25.00	₹ 25.00
2	**Plastic chair straight** Made from a plastic compound that is sturdy yet gentle enough to support your back while keeping you comfortable. It also arm rests on both sides with corrugations at the joints. The back is straight with a subtle angle to support the natural tendency of leaning back.	Nos 1	₹ 400.00	₹ 400.00
3	**Plastic teapoy** A table that is large, sturdy, yet light weight to move around easily. Made with carefully placed plastic sections to make the frame strong enough to hold an average person's weight. You can use it to bring out tea and it also doubles up as a stool when needed.	Nos 1	₹ 700.00	₹ 700.00

Total Quantity 3 Total ₹ 1,125.00

2.3 Allow Print for Draft

The documents (mostly transactions) have two stages of authentication, Save and Submit. The saved documents are the first draft and not submitted to the system. Hence printing is restricted for the documents at this stage. However, if you wish to permit users to print documents at the Draft stage as well, enable this checkbox.

2.4 Always add "Draft" Heading for printing draft documents

Enabling this setting also print "Draft" in the Print Format, thus indicating that document shared is not completely authenticated yet.

2.5 Allow Page Break Inside Table

If an item's description captures more than usual space of a page, then enabling this setting will split the item's details to the next page. Hence, a page break will be inserted between the Item Description, and the rest of the details will be pushed to the next page.

2.6 Allow Print for Canceled

Canceled transactions are the ones which don't have any impact on the reports. If you wish to allow printing for the canceled transactions, then enable this setting. A transaction can be canceled only once it is submitted.

2.7 Print Taxes with Zero Amount

In the sales and purchase transactions, you can add apply multiple taxes on the item. By default, in the print format, only taxes which have some amount calculated are visible. If you wish to also print the tax which was not applied and has zero tax amount, enable this setting.

3. Network Printer / Print Server

You can enable print server by filling the print server IP and port. Then chose the default printer.

Before enabling this feature you have to install the pycups library.

You may need first to install cups library if is not already on your system

For Debian OS Family:

sudo apt-get install libcups2-dev

For Red Hat OS Family:

sudo yum install cups-libs

After that, install pycups in the env using the command:

./env/bin/pip install pycups

This is executed from the frappe-bench directory.

4. Raw Printing

You can enable raw printing and print to many supported thermal printers. Read [Raw Printing](#) to know more.

➢ Print Format

With Print Format, you can set how document types look when printing.

Every transaction has a default Print Format called 'Standard'. You can change Print Formats by:

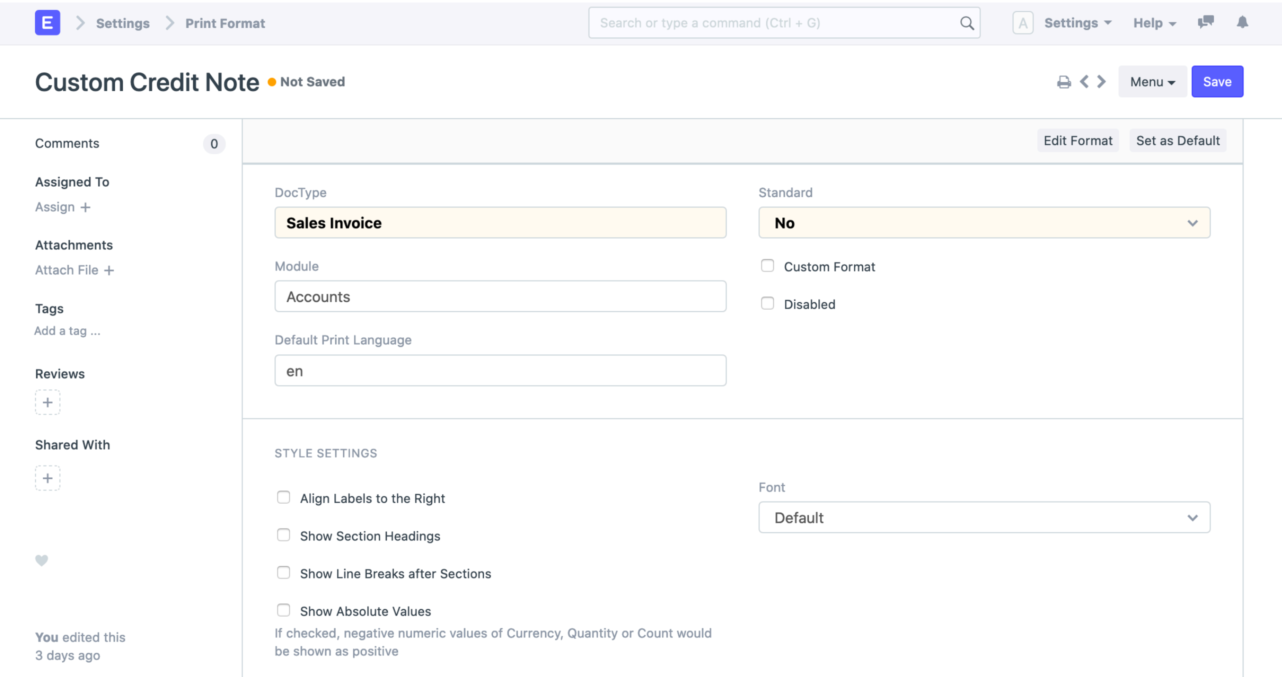
- Using the Print Format form
- Using Jinja/JS scripting under Print Format
- Using the Print Format Builder to create print formats with UI
- Using Customize Form to hide/unhide fields

To access Print Format, go to:

Home > Settings > Print Format

1. How to create a Print Format

1. Go to the Print Format List, click on New.
2. Enter a name and select a DocType for which the Print Format is to be used.
3. The module for which it should apply will be selected automatically.



4. Save.

Under Style Settings, there are options to change the styling options. With those options, you can change the font, align the labels together on the left or right, add headings for sections, etc.

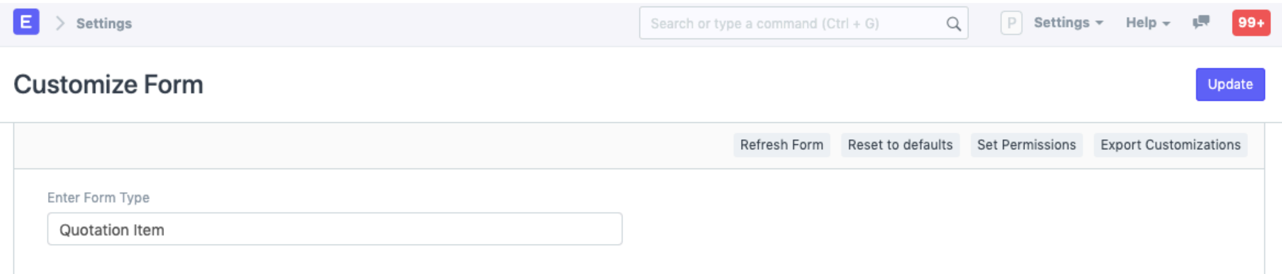
To style the Print Format using custom Jinja/JS, click on Custom Format. If you select this option, there'll be a checkbox for raw printing. To know more about raw printing, click here.

If developer mode is enabled, you can select Standard as yes to contribute a print format as a standard (preset) print format in the system.

1.1 Using Customize form to change the Print Format items

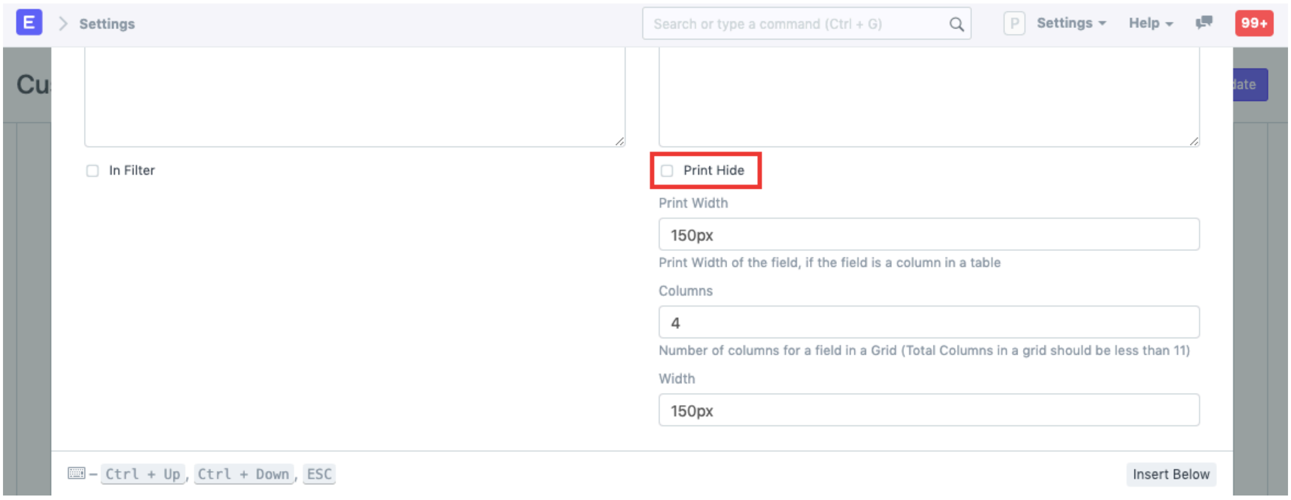
Fields in the transactions and their child tables can be hidden/shown using Customize Form. For example, if you want to hide the 'Item Code' when printing a Quotation, click on the print icon to enter the print screen.

Go to Menu > Customize, select Quotation Item in the 'Enter Form Type' field.

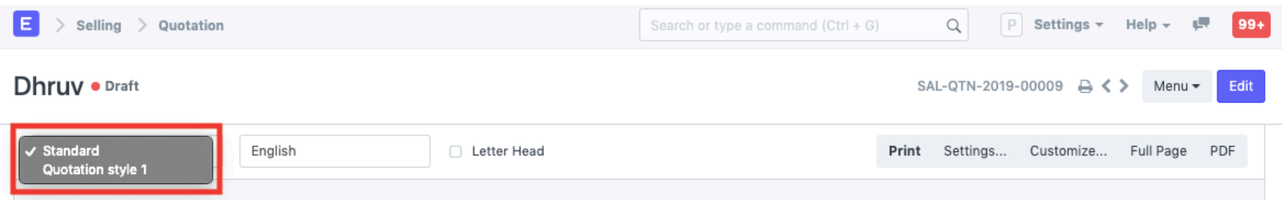


To know more, visit the Customize Print Format page.

In the fields table, expand the 'Item Code' row, scroll down and tick the 'Print Hide' checkbox.



A newly created Print Format can be selected on the print screen of a transaction. From there you can see how it looks and proceed to print.



➢ Print Format Builder

The Print Format builder helps you quickly make a simple customized Print Format by dragging and dropping data fields and adding custom text or HTML.

The 'Standard' Print Format is created by default, it cannot be edited.

To access the Print Format Builder, go to:

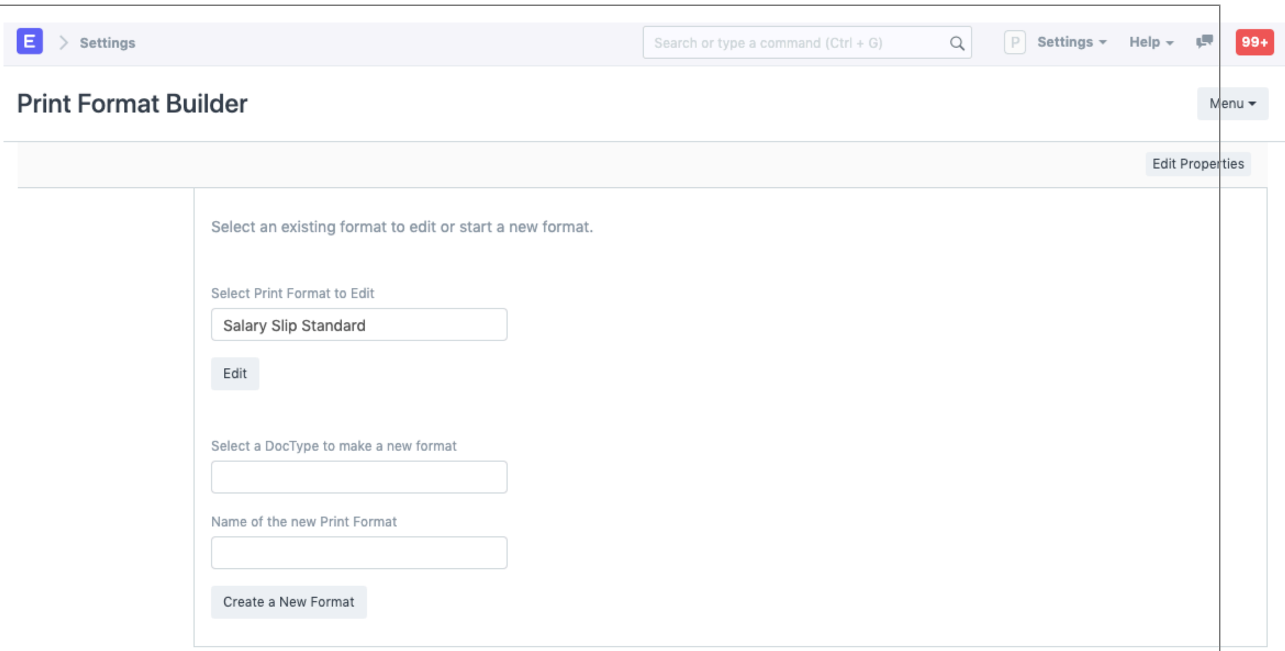
Home > Settings > Print Format Builder

Or via a document.

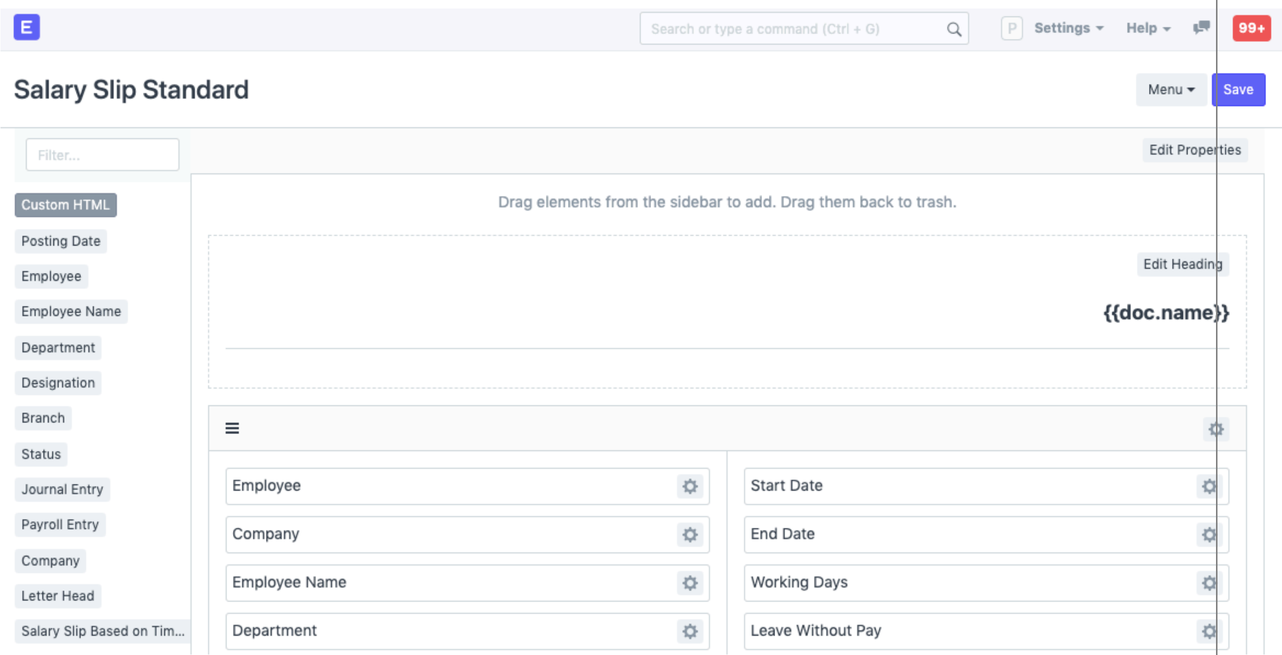
1. Using the Print Format Builder

1.1 Via the menu navigation

1. Go to the Print Format Builder.
2. Here you can edit an existing print format or create a new Print Format for a document type like Item, Quotation, etc.
3. Let's see how to edit an existing Print Format in this section. To know about creating a new Print Format, see the next section.
4. Select the Print Format to edit.



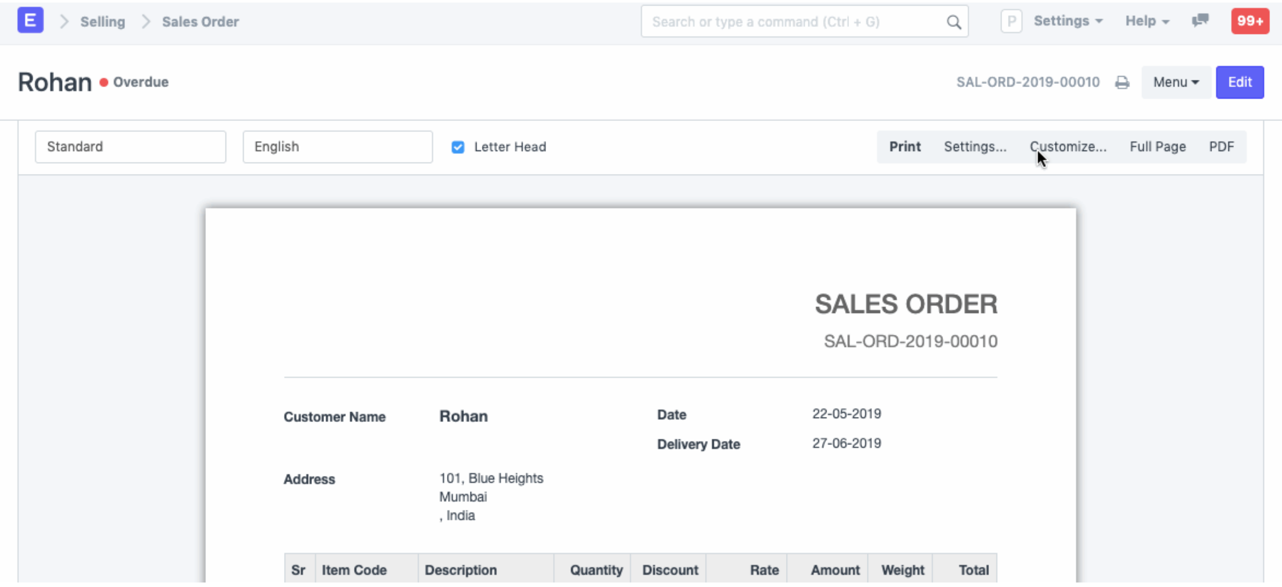
5.
6. Click on the Edit button, you will be taken to the Print Format Builder UI.



7.
8. Here you can drag and drop fields from the sidebar to the page and vice versa.
9. After making the changes, click on Save.

1.2 Via a document

1. Open the document for which you want to make a Print Format. Click the Printer icon, or go to Menu > Print and click on the Customize... button. Note: You must have System Manager permission to do this.



2. To add a field, just drag it from the left sidebar and add it in your layout. You can edit the layouts in sections or individual fields by clicking on the settings icon.
3. To remove a field, just drag it back into the fields sidebar.
4. Save.

You can add customized text, HTML in your print format, just drag and drop the **Custom HTML** field (in dark color) and add it to the place where you want to add the Custom HTML content.

Then click on **Edit HTML** to edit your content.

➤ Print Style

In Print Style you can define custom CSS styles applied to Print Formats.

ERP comes with preset styles for printing documents. You can also create new styles using CSS that can be applied to all your print formats.

The standard print Styles in ERP are: Monochrome, Modern, and Classic. To create a new **Print Style** go to:

Home > Settings > Print Style

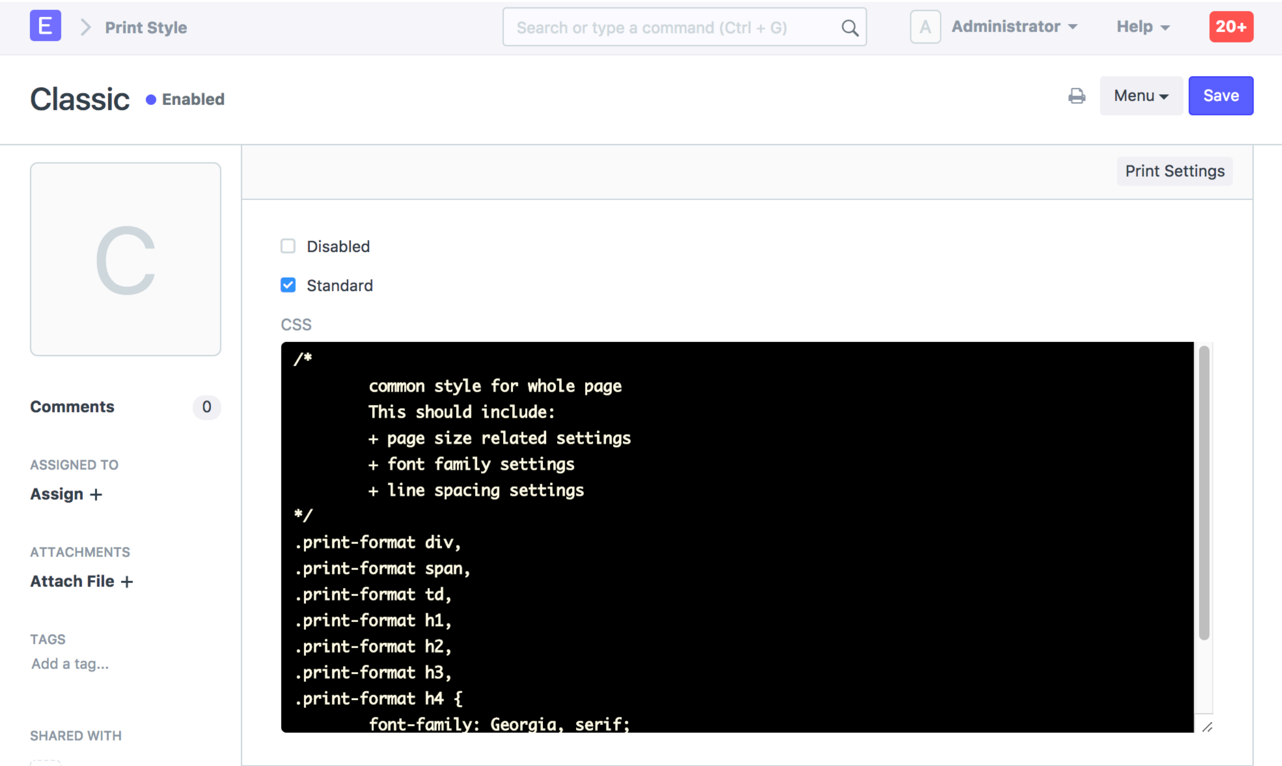
1. How to create a new Print Style

1. Go to the Print Style list, click on New.
2. Enter a name for the Print Style.
3. Enter the CSS that'll define how the style will look like.
4. Save.

The styles you create here apply to both standard and custom print formats. To find out the various CSS classes available, you can make a standard print format, open in a new page and see the source.

A default Print Style, can be set from Print Settings.

All Print Format styles are based on Bootstrap (Version 3) CSS Framework.



If you have enabled developer mode and tick on Standard then system will generate the JSON file for the Print Style. You can contribute a default print style with this.

➢ Print Headings

Print Headings are the names/titles you can give your transactions.

These transactions include Sales Invoices, Supplier Quotations, etc. You can create a list of names for different business communications.

If you want to rename a transaction on how it appears when printing, you can do so via Print Headings. For example, a Quotation is also called a "Proposal", Estimate", or "Pro Forma Invoice".

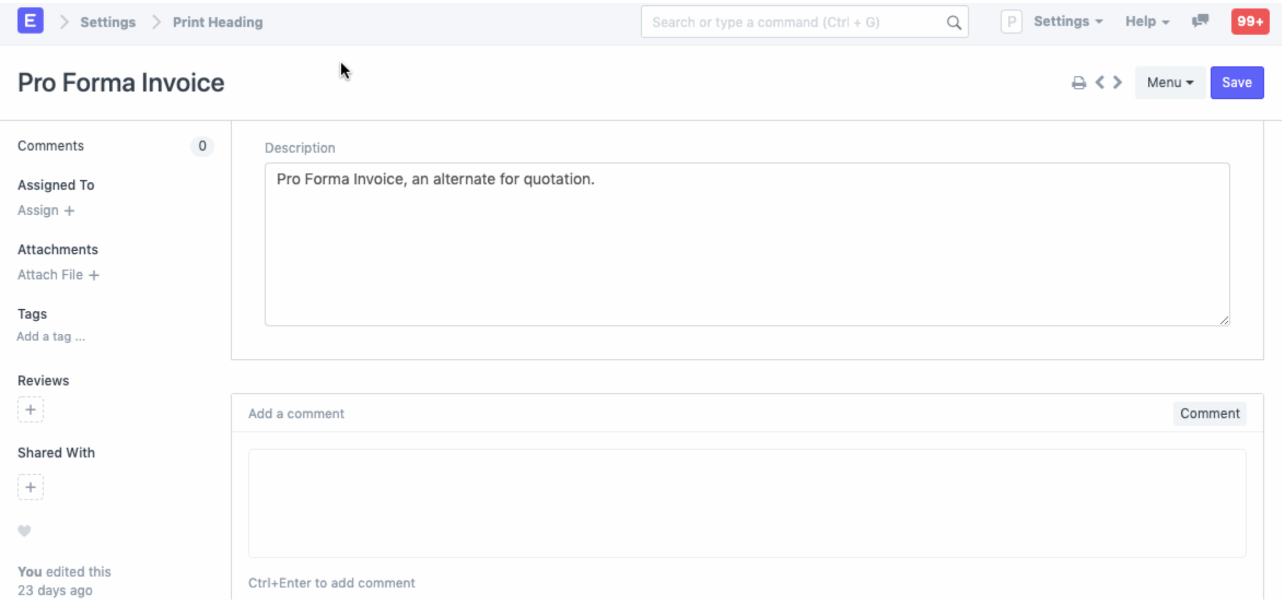
To access Print Headings go to:

Home > Settings > Print Heading

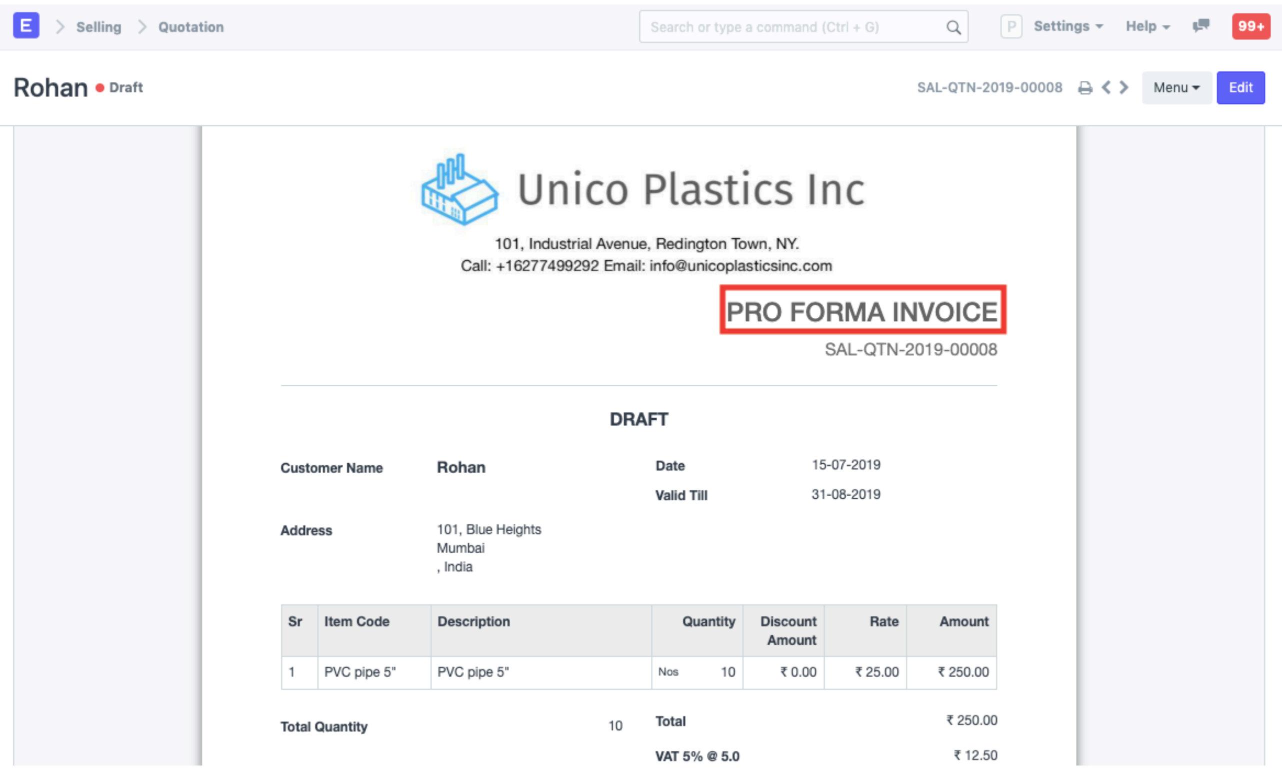
1. How to create a Print Heading

1. Go to the Print Heading list, click on New.
2. Enter the heading that will appear on the document.
3. Save.

To use the print heading, select the created print heading in the 'Print Heading' field transaction, shown as follows:



Example of a change in print heading is shown as follows:



➢ Address Template

Address template can store different formats of addresses based on the region.

Each region has its way of defining addresses. To manage multiple address formats for your Documents (like Quotations, Purchase Invoices, etc.), you can create country-wise **Address Templates**.

To access address template, go to:

Home > Settings > Address Template

A default Address Template is created when you set up the system. You can either edit it or create a new template. This default template will apply to all countries not having a specific template.

Consider a customer from the United States where 'County' is a part of the address. If you set county in the address template for United States, then it'll show up in the address field and hence in the print preview. Fields like PIN code can be changed to be displayed as ZIP code and fields like county can be added by using Address Templates.

The Address Template checks the 'Country' field in the Address master to apply different address templates to transactions.

1. How to create an Address Template

1. Go to the Address Template list, click on New.
2. Select a country.
3. Change the CSS and Jinja if required.
4. Save.

1.1 Jinja Templating

The templating engine is based on HTML and the [Jinja Templating] system. All the fields (including Custom Fields) will be available for creating the template.

Here is the default Jinja template:

{% raw %}{{ address_line1 }}

{% if address_line2 %}{{ address_line2 }}
{% endif -%}

{{ city }}

{% if state %}{{ state }}
{% endif -%}

{% if pincode %}PIN: {{ pincode }}
{% endif -%}

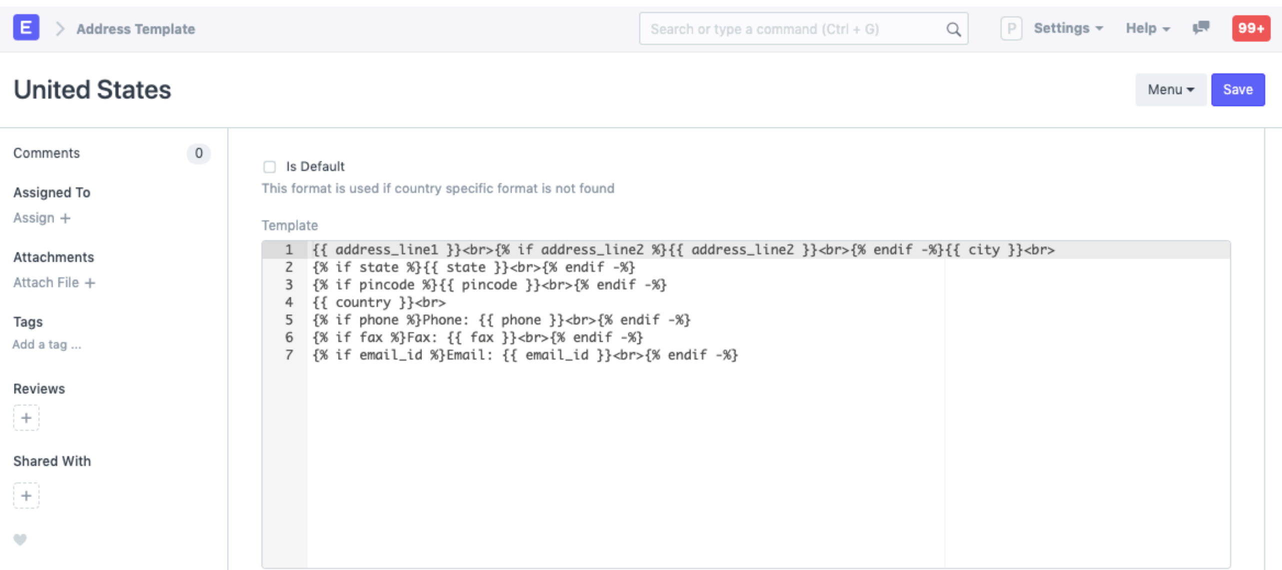
{{ country }}

{% if phone %}Phone: {{ phone }}
{% endif -%}

{% if fax %}Fax: {{ fax }}
{% endif -%}

{% if email_id %}Email: {{ email_id }}
{% endif -%}{% endraw %}

Here is an example:



➢ Terms And Conditions

Terms and conditions contain the terms and conditions of a service/product offered by a seller to a buyer.

Each Quotation/Sales Order must ideally contain a set of terms of your contract. Terms and conditions are usually included to define terms of service, conditions for using any service or to even limit responsibilities of the seller in case any harm is caused to the buyer due to using the provided goods or services. It is usually a good idea to make template(s) of your Terms and Conditions so that you have a standard set of

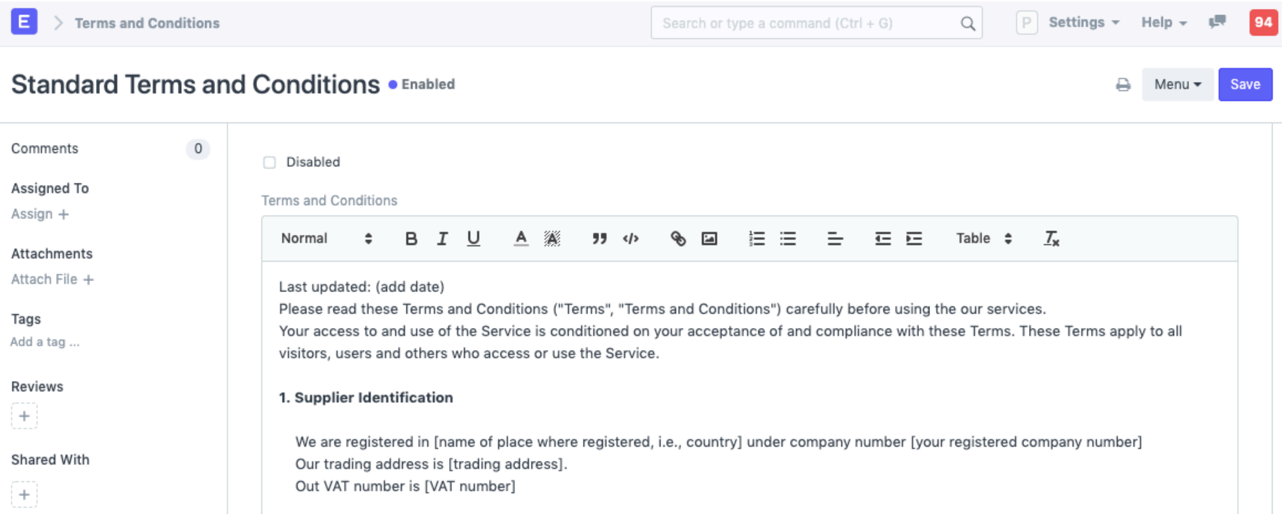
terms.

To access Terms and Conditions template go to:

Home > Selling > Terms and Conditions Template

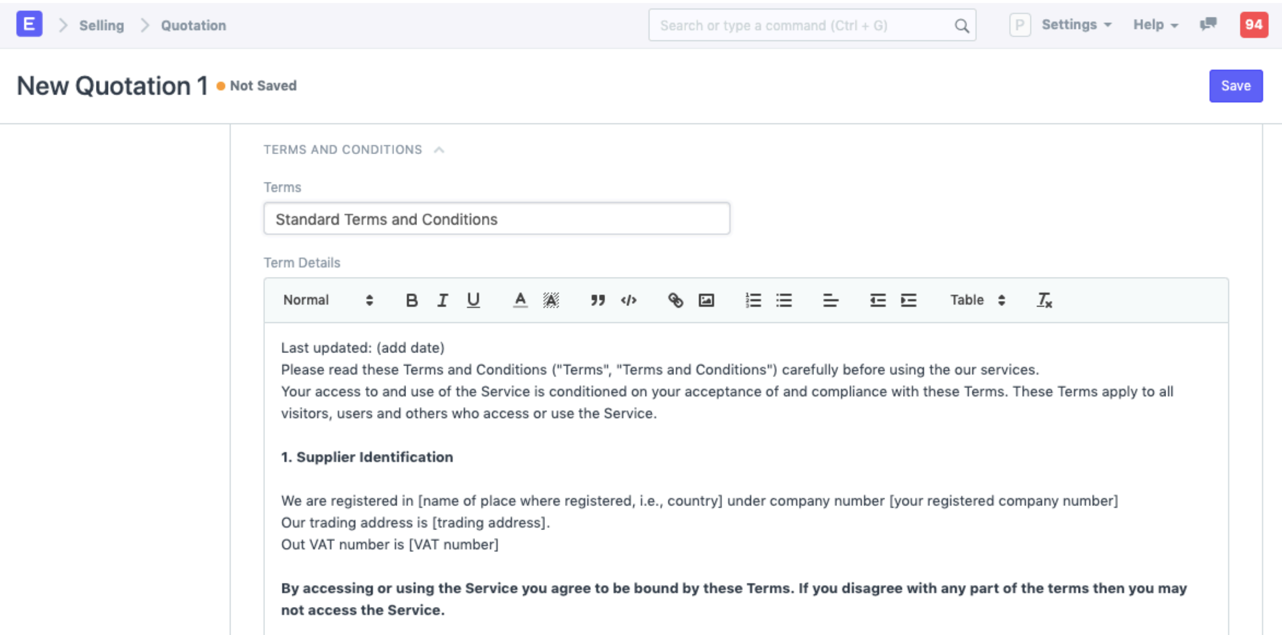
1. How to create Terms and Conditions Template

1. Go to the Terms and Conditions Template list, click on New.
2. Add the Terms and Conditions.



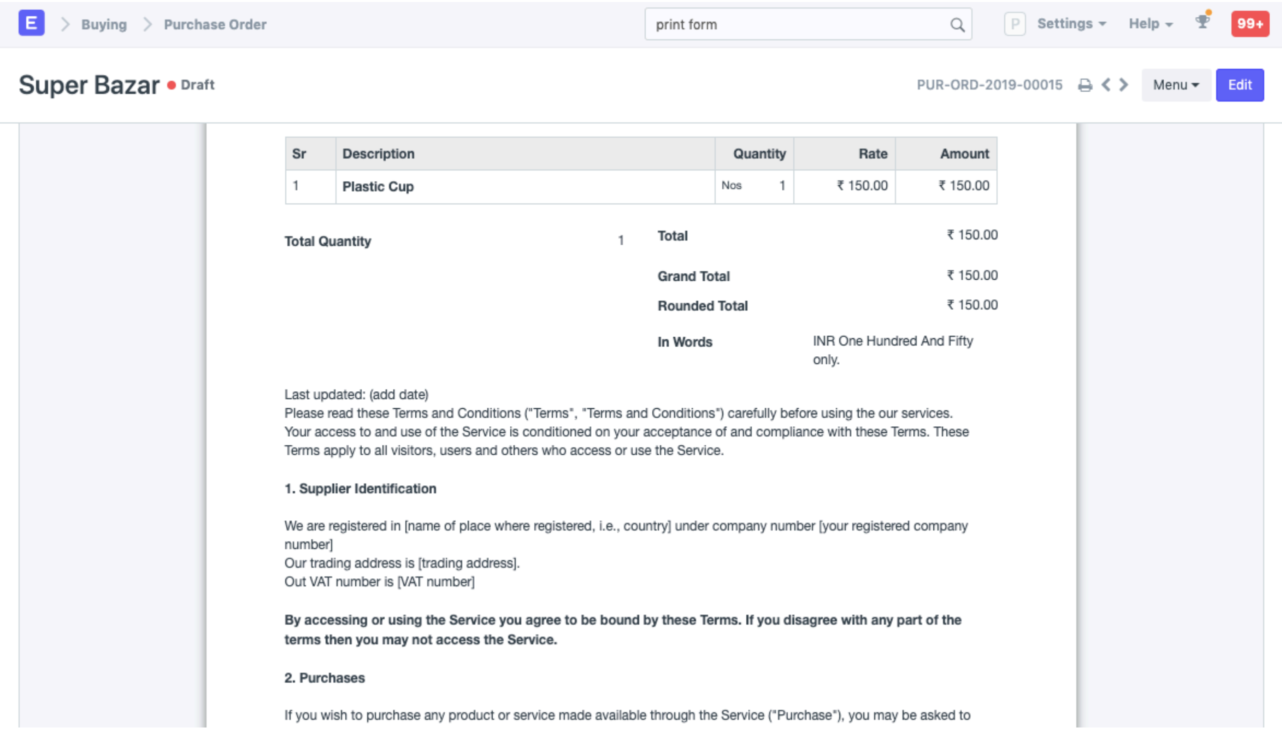
1.1. Select in Transaction

In transactions, you will find a section of Terms and Conditions where you will be able to search and fetch the required Terms and Condition master.



1.2 Terms and Conditions when printing

Once the Terms and Conditions are set in a Sales/Purchase transaction, it will appear when printing:


E > Buying > Purchase Order   print form   Settings Help 99+

Super Bazar • Draft   PUR-ORD-2019-00015   Menu   Edit

Sr	Description	Quantity	Rate	Amount
1	Plastic Cup	Nos 1	₹ 150.00	₹ 150.00

Total Quantity 1

Total	₹ 150.00
Grand Total	₹ 150.00
Rounded Total	₹ 150.00
In Words	INR One Hundred And Fifty only.

Last updated: (add date)
Please read these Terms and Conditions ("Terms", "Terms and Conditions") carefully before using the our services.
Your access to and use of the Service is conditioned on your acceptance of and compliance with these Terms. These Terms apply to all visitors, users and others who access or use the Service.

1. Supplier Identification

We are registered in [name of place where registered, i.e., country] under company number [your registered company number]
Our trading address is [trading address].
Out VAT number is [VAT number]

By accessing or using the Service you agree to be bound by these Terms. If you disagree with any part of the terms then you may not access the Service.

2. Purchases

If you wish to purchase any product or service made available through the Service ("Purchase"), you may be asked to

1.3 What should Terms and Conditions contain?

Here are some common topics that Terms and Conditions should contain:

- Validity of the offer.
- Payment Terms (In Advance, On Credit, part advance, etc).
- What is extra (or payable by the Customer).
- Safety/usage warning.
- Warranty if any.
- Return Policy.
- Terms of shipping, if applicable.
- Ways of addressing disputes, indemnity, liability, etc.
- Address and Contact of your Company.

Terms and conditions are the general and special arrangements, provisions, requirements, rules, specifications, and standards that a company follows. These specifications are an integral part of an agreement or contract that the company gets into with its customers, suppliers or partners.

➢ Cheque Print Template

Cheque Print Template allows defining templates for bank cheques.

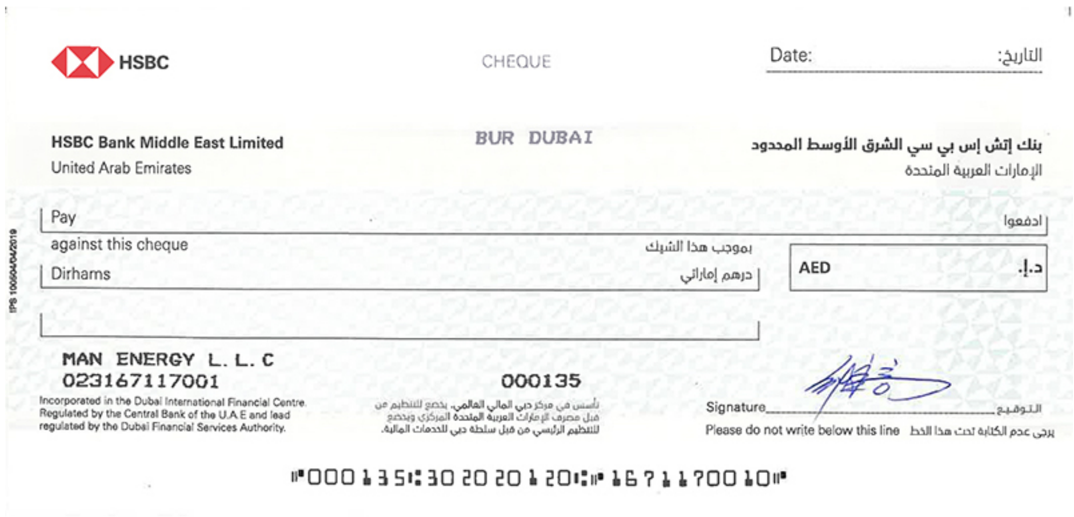
Business involves making payment to various parties like suppliers and employees. Payment can be made in various modes like cash, NEFT or cheque. If you are making a payment via a cheque, you can also create a Print Format for printing Cheques from ERP based on the Payment Entry.

To access Cheque Print Template, go to:

Home > Accounting > Cheque Print Template

Using the Cheque Print Template you can generate a new Print Format for cheques. It will be created based on the cheque format provided by your bank.

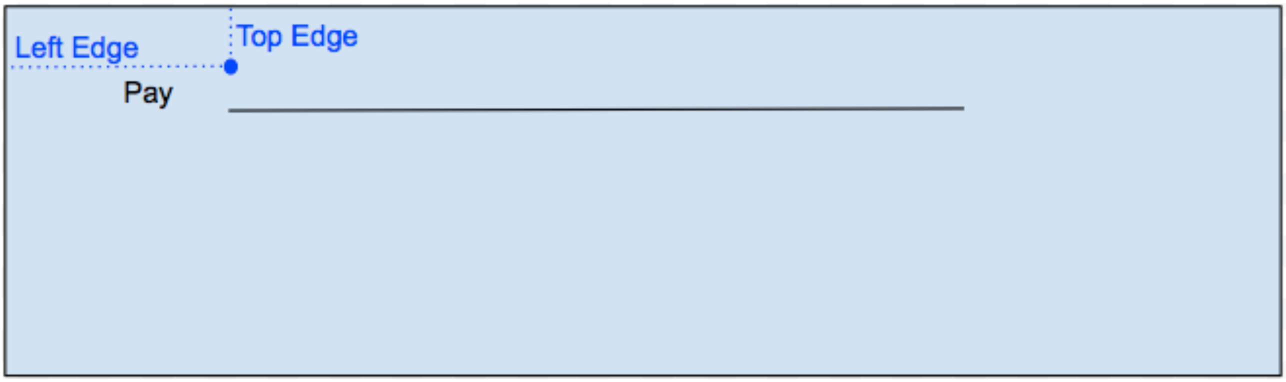
A sample cheque:



1. How to create a Cheque Print Template

1. Go to the Cheque Print Template list, click on New.
2. You can set the position of various items in the cheque.
3. Save.

In the Cheque Print Template, for each value (say Payee, Date), exact coordinates are provided based on where that value should be printed on a cheque. Co-ordinates are provided in centimeters. Here is a representation the structure:



1.1 New Format by Scanning

To speed up the creation of a new cheque printing format, you can upload a scanned image of the cheque. Considering the scanned image for the cheque, the system automatically updates co-ordinates for each value like party name, amount, date, the amount in words, etc.

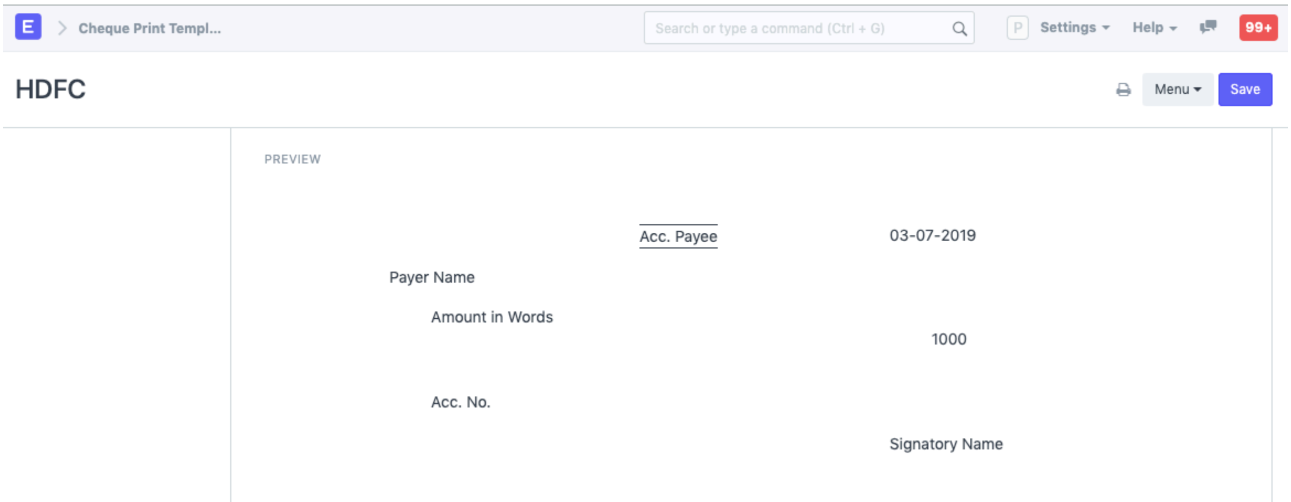
1.2 New Print Format manually

If the preview looks good, click on the **Create Print Format** button to create a new Print Format for printing the cheque. Based on the values provided in the Cheque Print Template, the system will auto-generate an HTML script for the cheque' s Print Format.

You can manually provide the co-ordinate for each value based on where you want it to be printed on the cheque and customize with HTML/CSS.

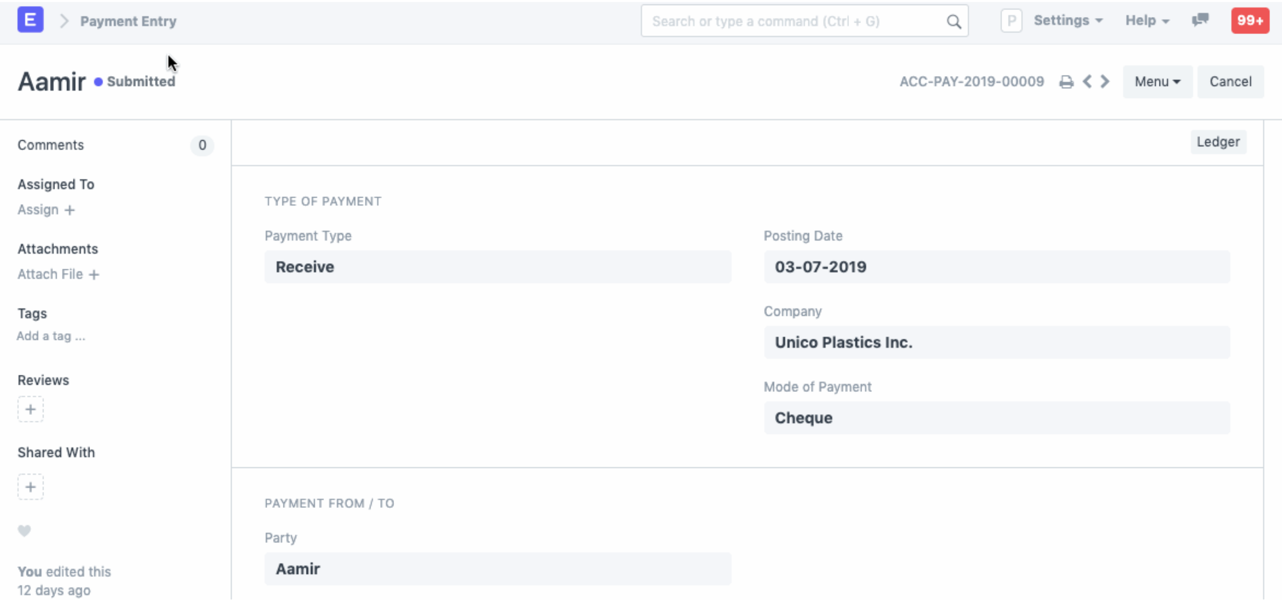
Preview

Based on coordinates provided for all the values, a preview will be shown as to how the values will be printed on the cheque.



1.3 Printing Cheques

New print format generated for the cheque will be visible in the Payment Entry form. After creating the payment entry, you will be able to print transaction details on the cheque.



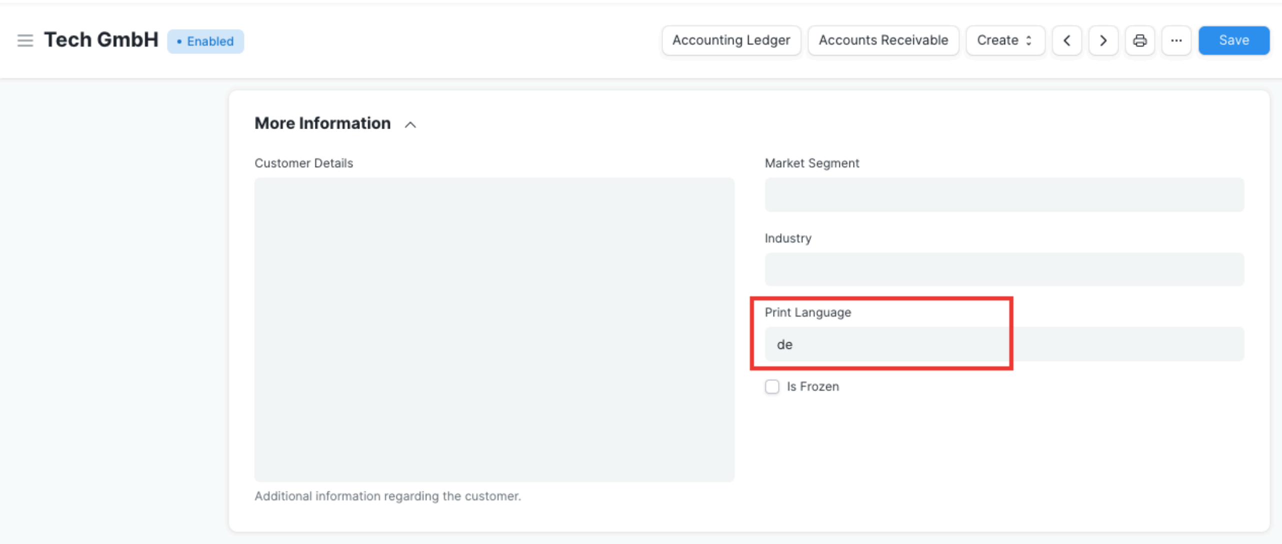
➢ Custom Translations

With Custom Translations, user can print the customer's and supplier's document in their local language.

For example, if you have customers from Germany and France who want quotations in German and French, it's possible using Custom Translations.

1. Set the Language

In the Customer master, select the default Language. Say, the default language for the Customer is **Spanish**.

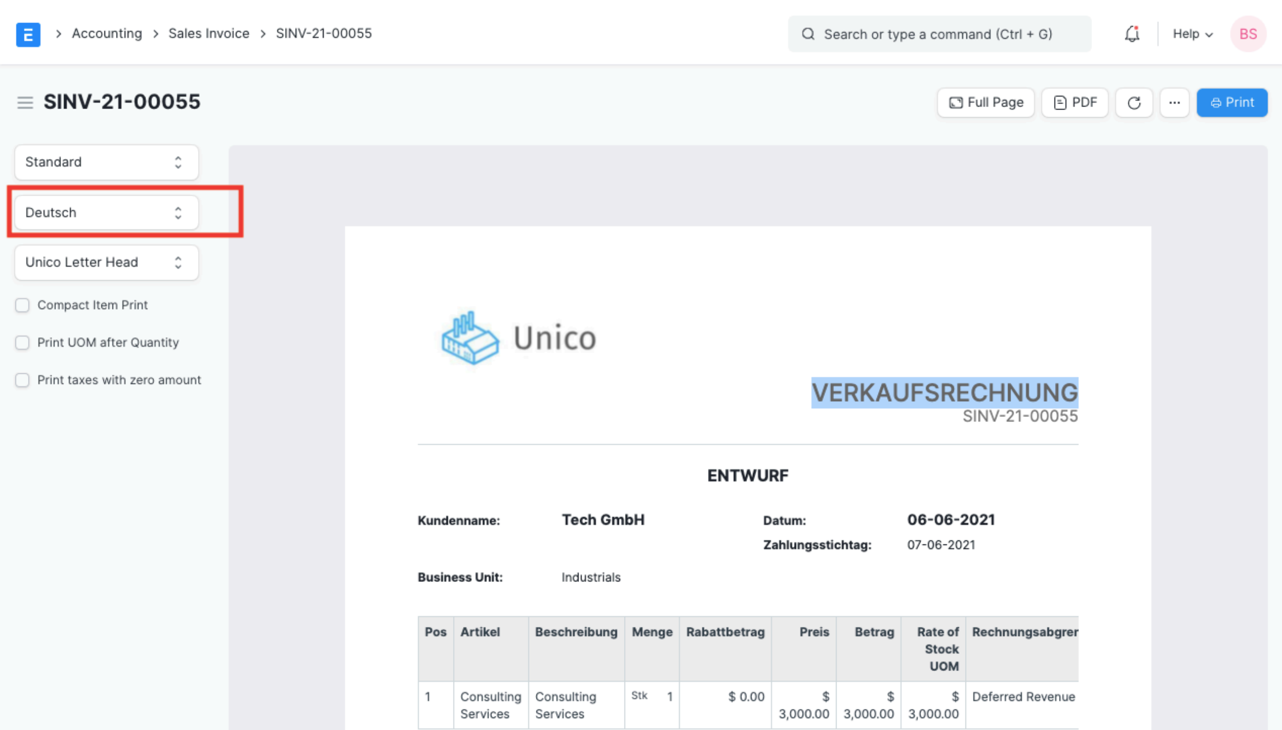


Same way, you can also set default language in the Supplier master.

1.1 Print Preview in the Party's Language

In the Print Preview of a transaction, values will be translated into the party's language.

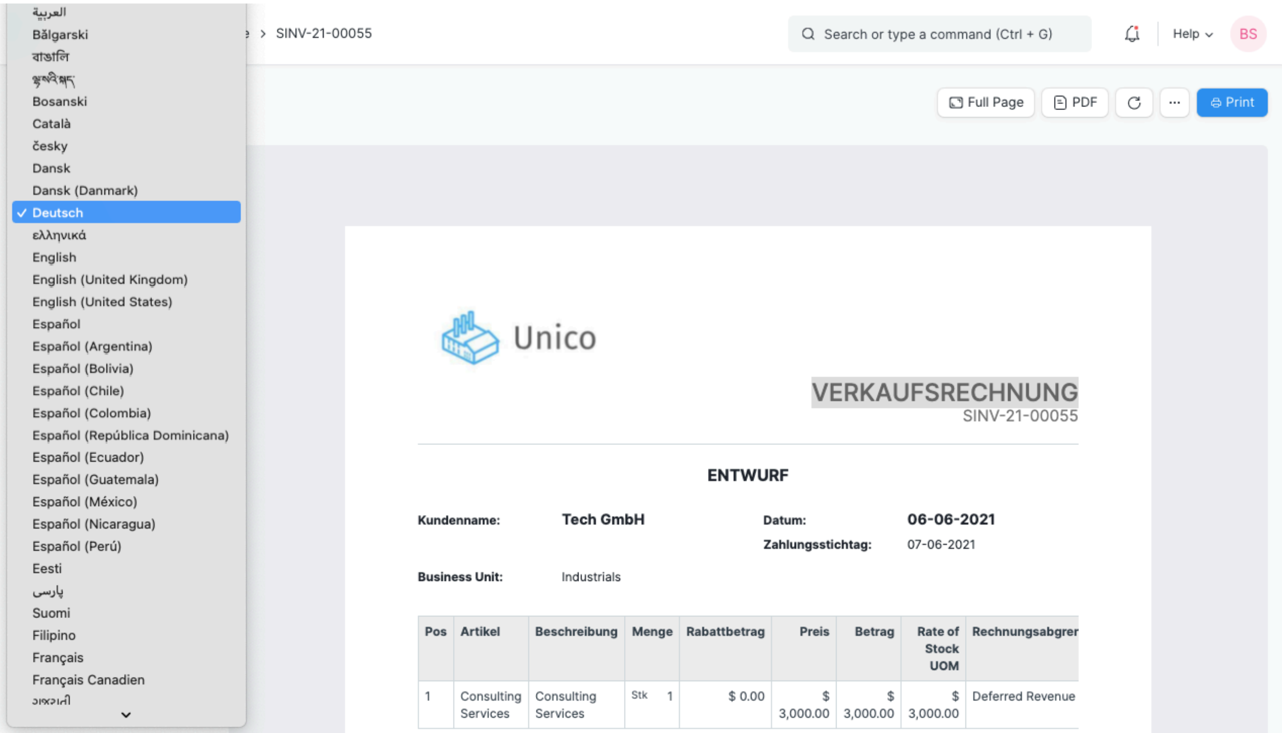
Customer Quotation print preview in customer's default language.



Supplier Quotation print preview in supplier's default language.

1.2 Changing the print language in the preview

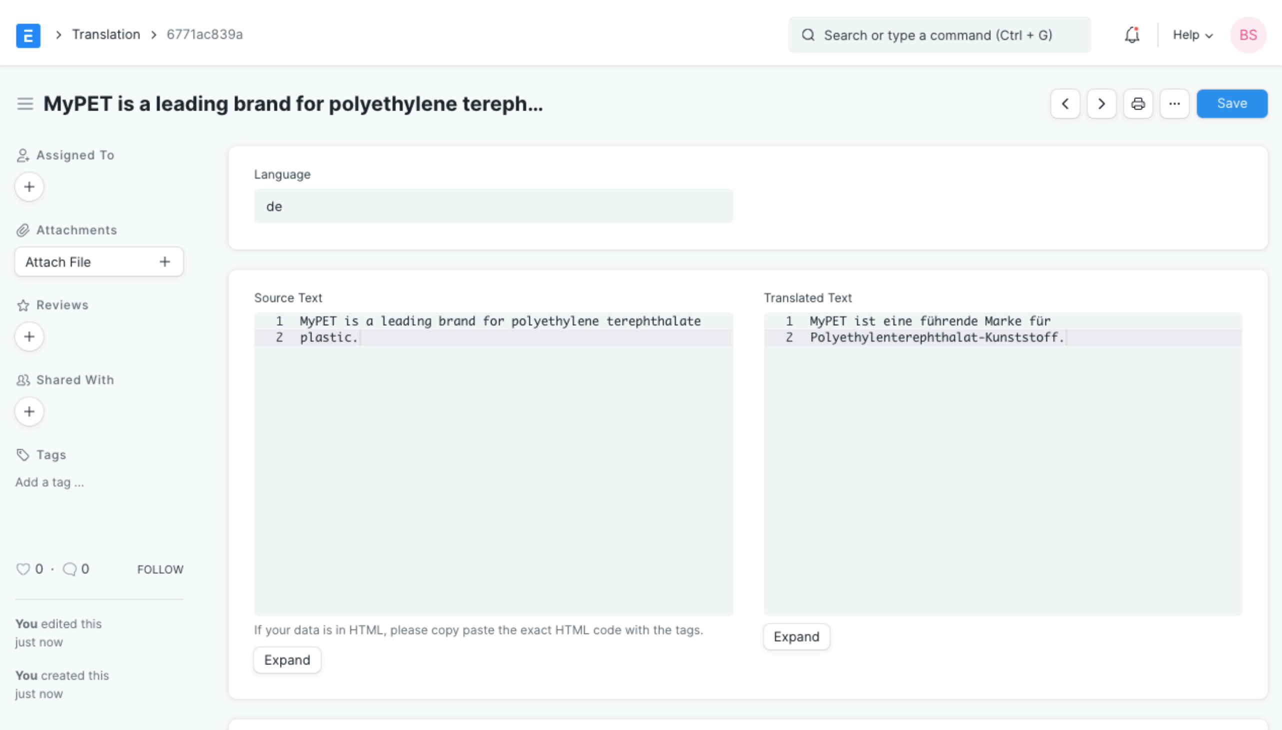
User has the option to select an alternate language on print view.



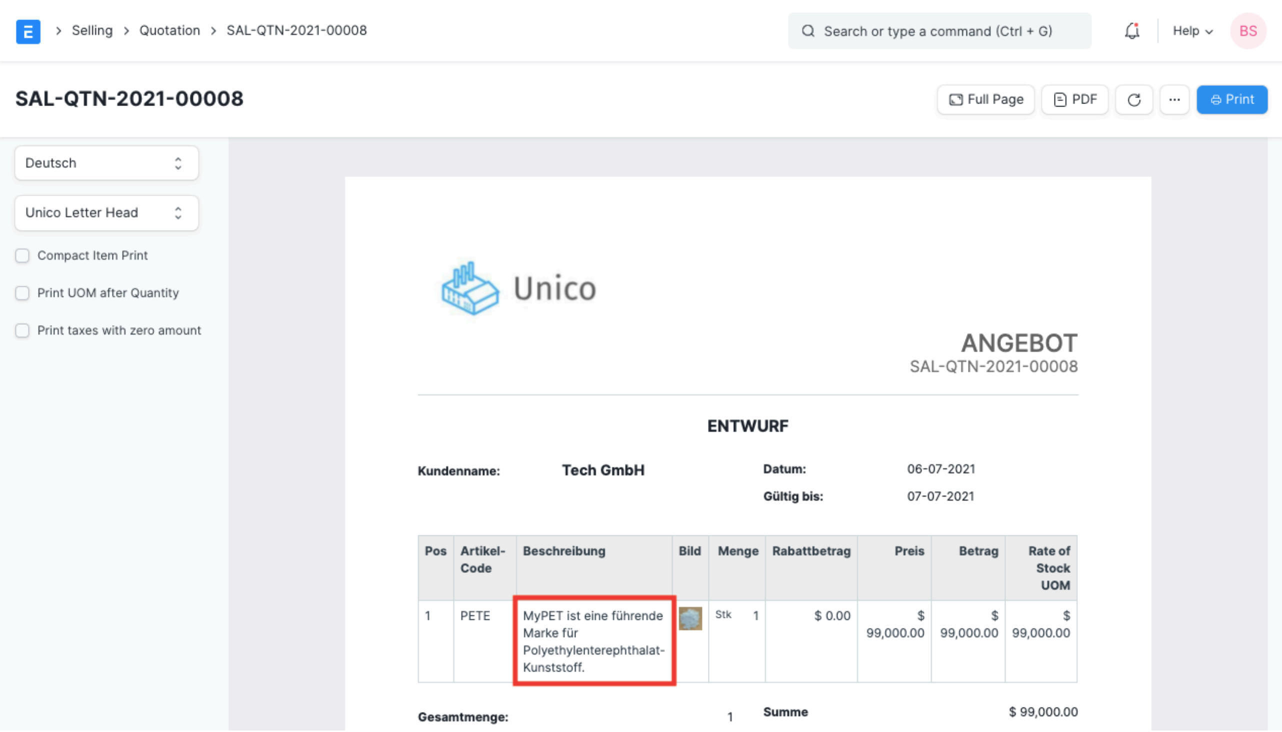
2. Custom Translation

Users can set their custom translations using Custom Translations form. For example, if a user wants to set a description of a product in the customer's language (Spanish). For that, create a new translation with language as Spanish, enter source data and translated information.

Home > Customization > Other > Custom Translations > New



The translation is applied when the user selects the language as Spanish on supplier Quotation's print preview. Note that no translation is applied for the second item's description since it wasn't created in the Translation list.



➢ Raw Printing

Sending a string of commands to a printer directly in its native language is called Raw Printing.

Many thermal printers need these raw commands sent to them in order to perform functions like barcode printing, receipt printing, label printing, etc. Raw Printing bypasses the printer's drivers in most cases, making them very fast and reliable. Raw Printing is also capable of doing some advanced features such as cutting receipt paper, kicking out cash drawers, etc.

1. Setting up Raw Printing in ERP

1.1 Installing QZ Tray application on the client computer

Download and install the QZ Tray application on the computer to which your thermal printer is connected. This application can be found at its official site. Currently, Windows, macOS, and Linux are supported by QZ Tray. During the installation you will be prompted to install Java if not already installed, please install Java to complete the installation.

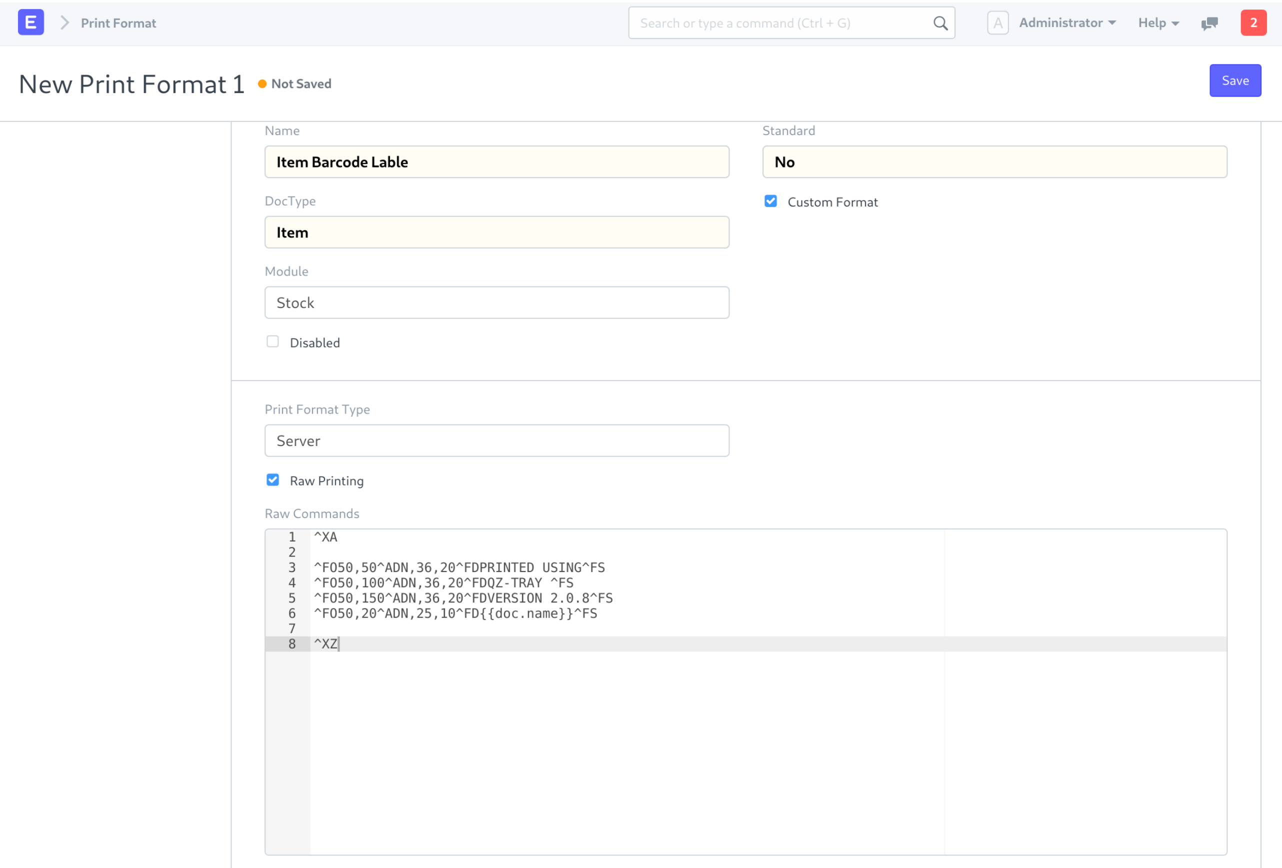
Further instructions on installing the QZ Tray Application can be here.

1.2 Create Raw Commands Print Format

To be able to send raw commands to a printer you need to first create a print format in raw commands. Jinja Templating Language is used in raw commands just like in the HTML custom print format.

To create a new print format for Raw Printing:

1. Go to print format list: **Home > Settings > Printing > Print Format**
2. Click on New.
3. Select the relevant DocType.
4. Check the **Custom format** and **Raw Printing** options.
5. Fill in the **Raw Commands** field with the required raw commands to be sent to the printer.
6. Click Save.



Currently, any string-based printer languages can be used in the Raw Commands field in the print format. Writing raw commands requires knowledge of the printer's native language provided by the printer manufacturer. Please refer to the developer manual provided by the printer manufacturer on how to write their native commands.

1.3 Enable Raw Printing in the Print Setting

To enable Raw Printing:

1. Go to: **Home > Settings > Printing > Print Settings > Raw Printing**.
2. Check the **Enable Raw Printing** option.
3. Save.

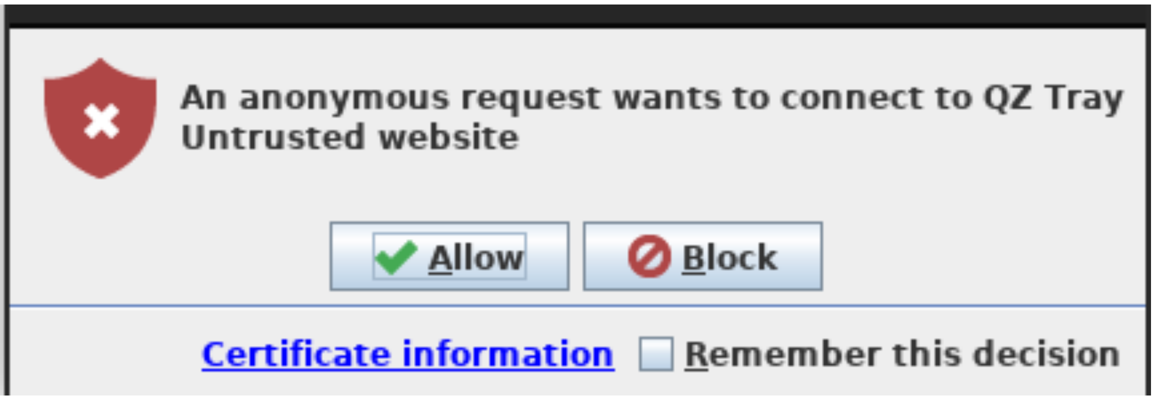
2. Methods to utilize raw printing in ERP

There are two ways to send Raw Printing commands to your printer.

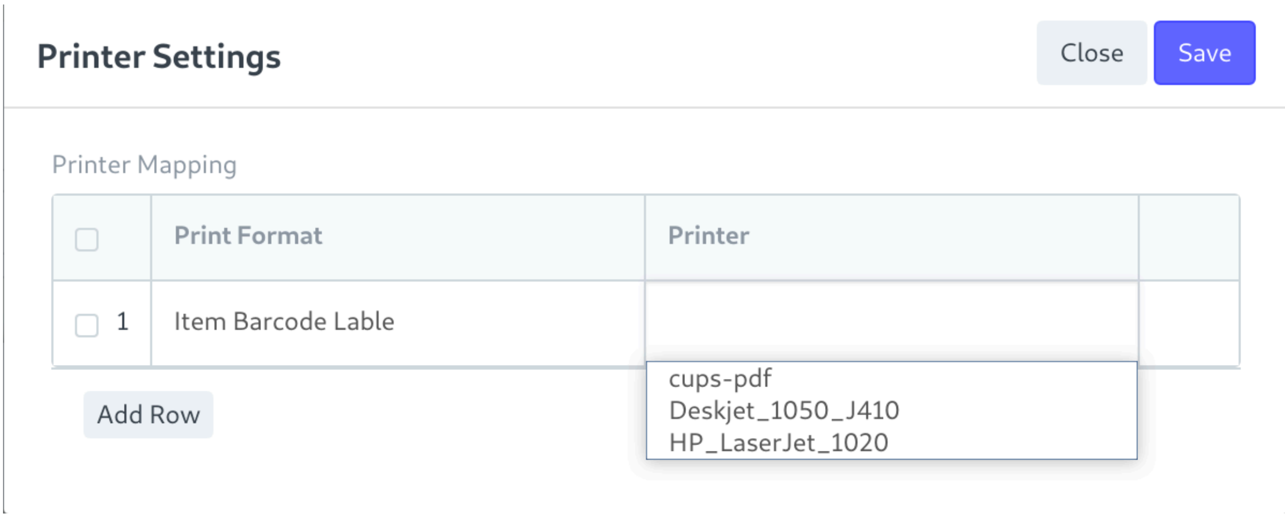
2.1 Clicking print on the print view page

To print a raw command print format from the Document print view:

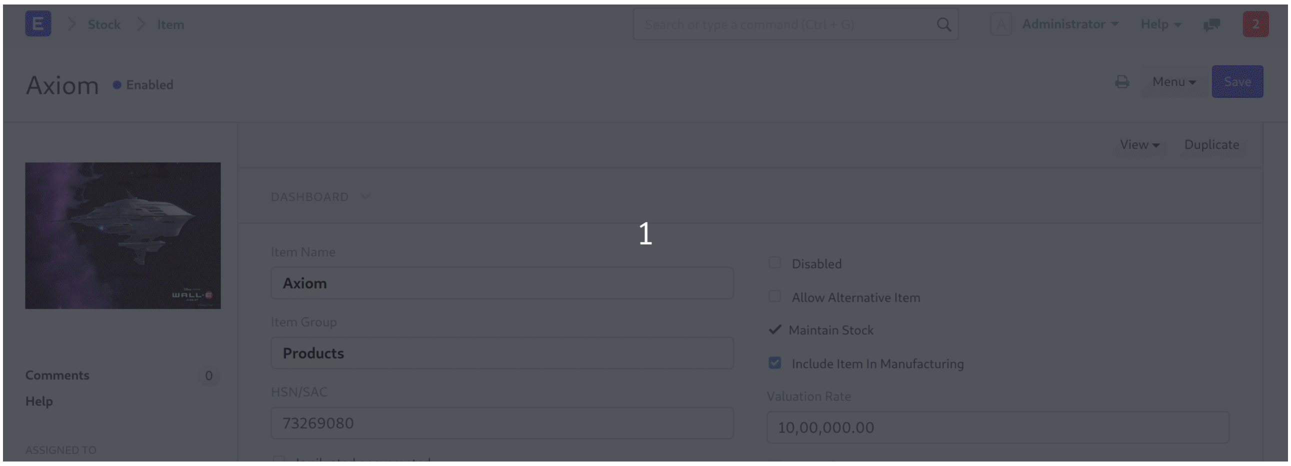
1. Select appropriate print format. For print format in Raw Commands, "No Preview available" message is shown in place of the print preview.
2. Click on the print button.
3. Please allow the connection prompt from the QZ Tray for the actions that you initiated (Keyboard Shortcut: Alt + A).



4. You may be asked to select the "print format - printer mapping".
    - This mapping is used to send the print commands to the appropriate printer.
    - The printer needs to be installed on your computer to be able to map it to a print format.



    - This mapping is stored locally on the same computer and will have to be set on each client machine.
    - You can also edit this by clicking on the **Printer Settings** button.



2.2 Calling Raw Print functions from a client script

It is often a requirement that a print command has to be issued on a certain event (like submit, save, amend, etc.). It is possible to write a client script to do this for you.

Following are the relevant Raw Print functions:

1. function: frappe.ui.form.qz_connect
    - A connection wrapper to establish a connection with the QZ Tray application.
    - Returns a promise which resolves on successful establishment of a connection.

P.O.Box 128448, Dubai, United Arab Emirates
man.energy 800696

- Allows active and inactive connections to resolve regardless. Hence it can be called every time before sending a command.
- Usage example:

```
frappe.ui.form.qz_connect()
.then(function () {
    return qz.print(config, data);
})
.then(frappe.ui.form.qz_success)
.catch(err => {
    frappe.ui.form.qz_fail(err);
});
```

Here, qz is a global object provided by the qz-tray.js library.

2. function: frappe.ui.form.qz_get_printer_list
   - Gives you the list of printers available to the QZ Tray application
   - Returns a promise which resolves to a list of printers

Usage example:

```
frappe.ui.form.qz_get_printer_list().then(
    // Required action on getting the printer list.
    // Note: Printer list is a array of strings.
);
```

3. function: frappe.ui.form.qz_success
   - Displays a "Print Sent to the printer!" alert to the user. Can be called after the print command is successful.
4. function: frappe.ui.form.qz_fail
   - Displays the error message to the user. Should be called on failure of QZ Tray connection.

You can also directly access the functions provided by the qz-tray.js library via the qz object. Click here for qz-tray.js library documentation.

Note: The qz object is initialized only after calling the frappe.ui.form.qz_connect for the first time. In case you require the qz object before that you can use the frappe.ui.form.qz_init.

WORKFLOWS

➢ Workflows

With workflows you can rewrite how a particular process/workflow is approved in ERP.

You can set multiple levels of approval for an ERP Workflow. To allow multiple people to submit multiple requests, for approvals by multiple users, ERP requires you to fill the Workflow conditions. ERP tracks the multiple permissions before submission.

Consider a scenario, where multiple levels of approval are required for a quotation. A sales person (user with 'Sales User' role) will create a quotation. Then it is either approved or rejected by a sales lead (user with 'Sales Manager' role). If approved by sales lead, it is further approved or rejected by regional manager (user with 'Regional Manager' role).

To make a Workflow and transition rules go to:

Home > Settings > Workflow

Once a Workflow is created, you can take actions on it via Workflow Actions.

1. Prerequisites

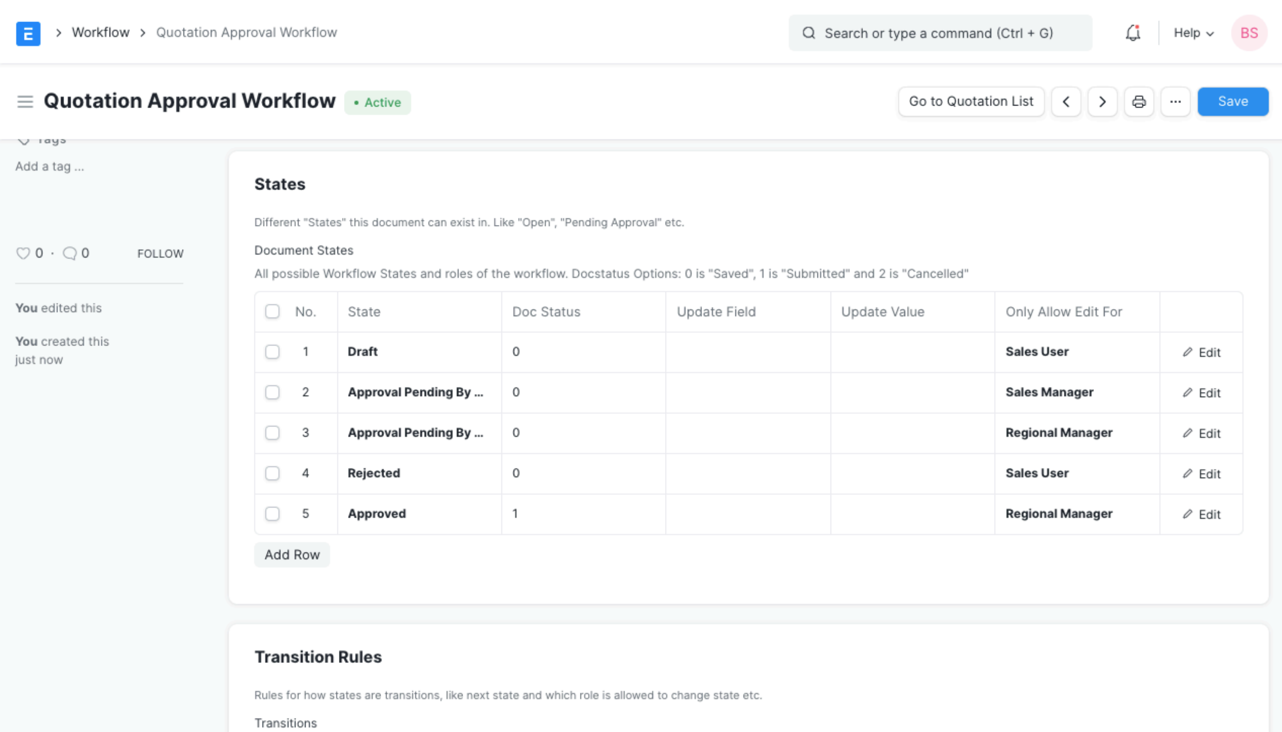
Before creating a Workflow, it is advised to create these first:

- Workflow Actions
- Workflow States like Approved, Canceled, etc.

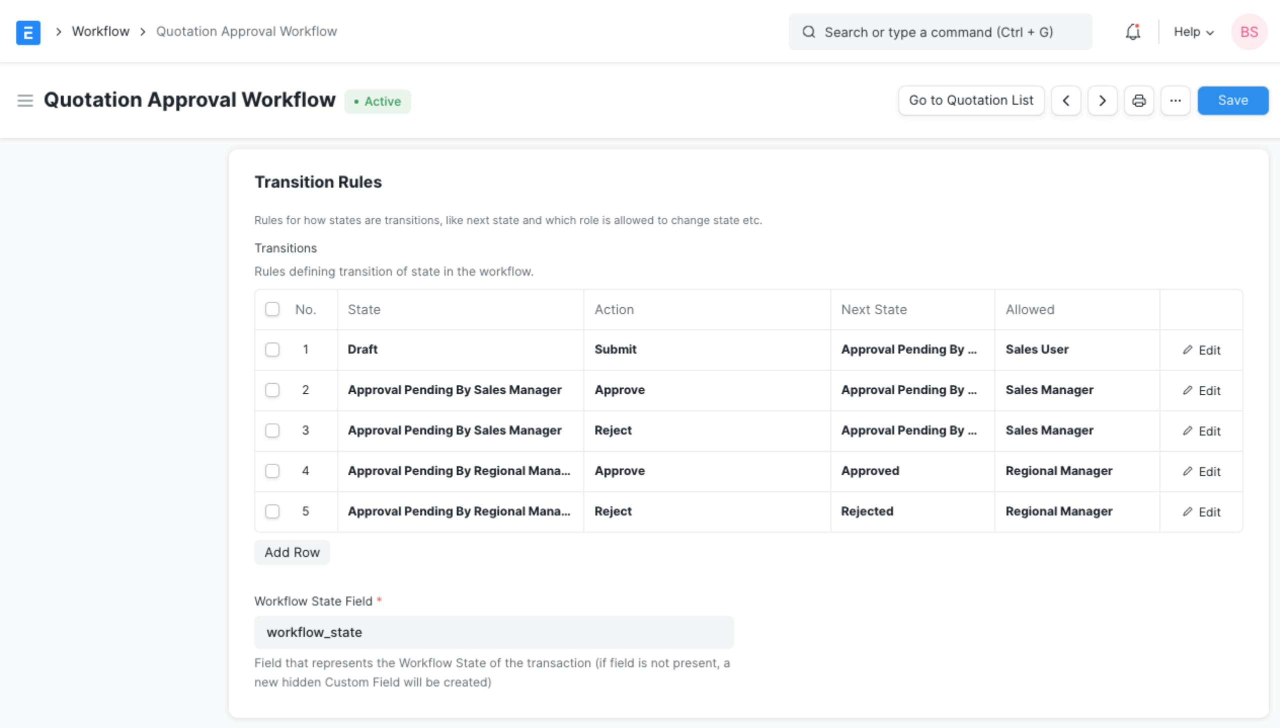
2. How to Create a Workflow

1. Go to the Workflow list, click on New.
2. Enter a name for the **Workflow** and select the DocType on which to be applied.
3. Enter the different states of the Workflow. Enter Doc Status for them, select which field to update from the Update Field column, enter what the value will be updated to under Update Value.

The Workflow States can have different colors according to the state. Eg: Green for success. Document statuses: Saved = 0, Submitted = 1, Cancelled = 2.



4. Enter the Transition Rules.



2.2 Things to note when creating a Workflow

- Creating a Workflow in ERP essentially overrides the regular Save and Submit workflow. Thus the document will function based on your Workflow and not based on the pre-set code workflow. Hence there might be no Submit button/option if you have not specified it in the Workflow you create.

If you don't apply a Workflow to a document, and that document is submittable, then it has the default workflow with states: Draft - Submitted - Cancelled. If you are applying a Workflow to a submittable document, then those default states should be handled by the user.

- A document cannot be canceled unless it is submitted.
- If you wish to give the option to cancel, you will have to write a workflow transition step that says from submitted you can cancel.
- If fields under Update Field column are not updated, a new custom field will be created with the name you set in the 'Workflow State Field' field.

2.3 Other options for a Workflow

1. Is Active: On ticking this, all other Workflows for the selected DocType become inactive.
2. Don't Override Status: This Workflow's status will not override the status of the document (Quotation) in the list view.
3. Send Email Alerts: Emails will be sent to the user with next possible workflow actions.

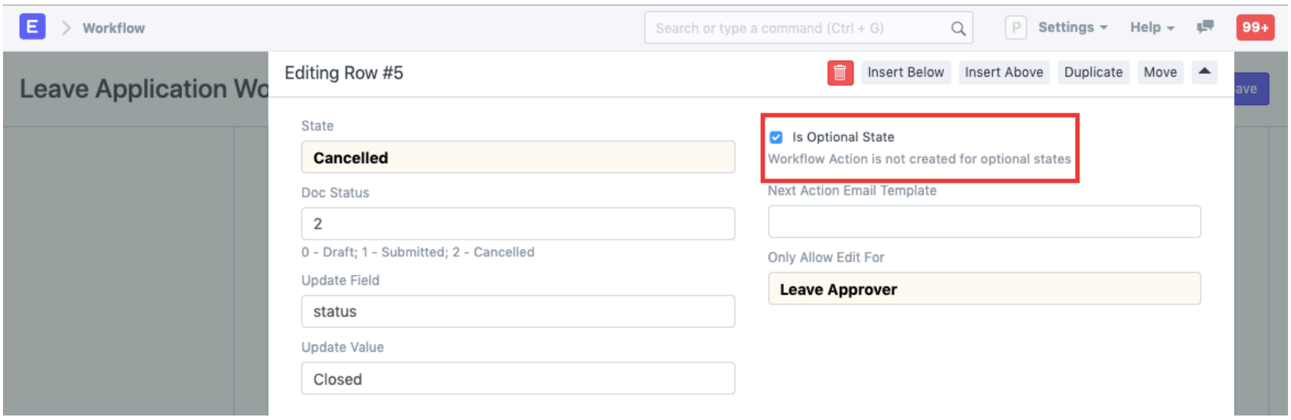
3. Features

3.1 Enable/Disable Optional Workflow State

Introduced in Version 12

In States, optional Workflow state means that the state may not be a part of final approval.

E.g. states like Canceled or Rejected can be optional.



Note: Workflow Actions are not created for optional states.

3.2 Conditions

You can also add a condition for the Transition to be applicable. For example, in this case, if sales executive creates a quotation with grand total of $100,000 or more, a particular role must approve. For this to happen in the particular transition, you can set a property for **Condition**:

doc.grand_total <= 100000

Here, grand_total is the field name of the field 'Grand Total' of Quotation. To see the field name of a field go to Menu > Customize.

This can be extended to any property of the document.

Introduced in Version 13

In Version 13, you can use date/time, session, get*value and get*list functions in your condition expressions.

Allowed functions:

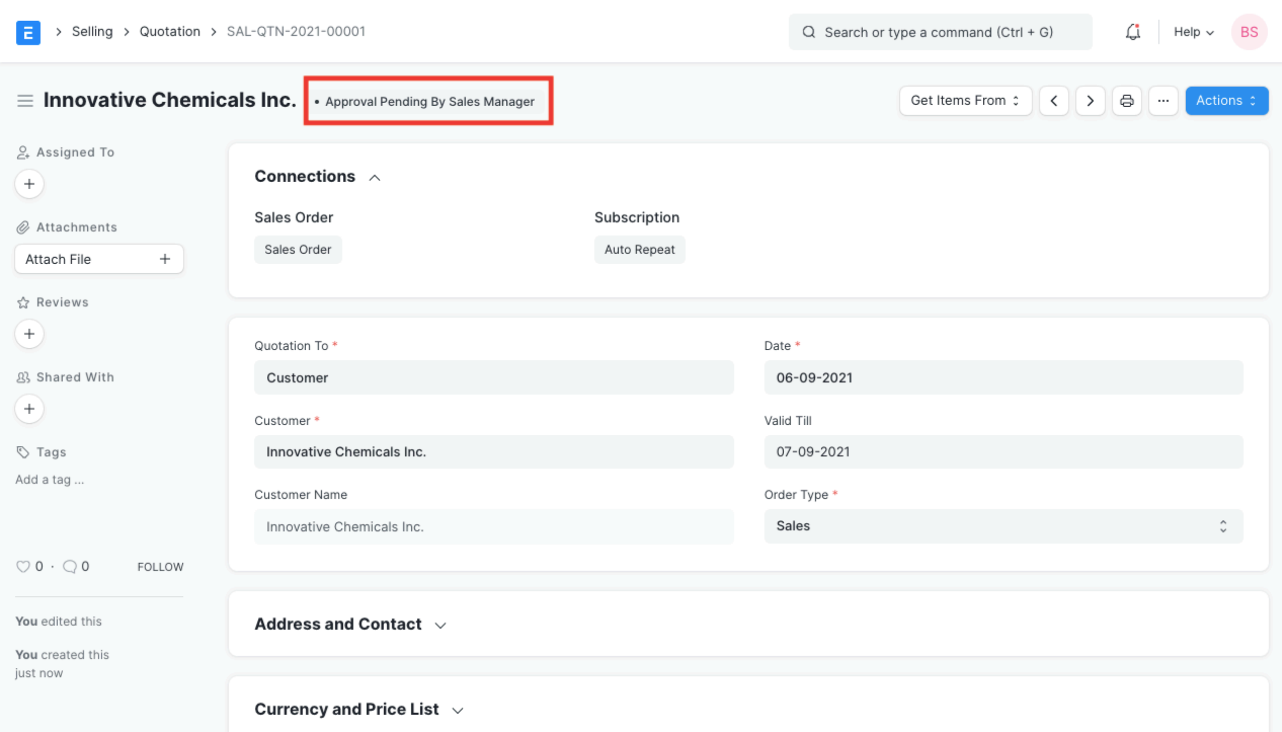
- frappe.db.get_value
- frappe.db.get_list
- frappe.session
- frappe.utils.now_datetime
- frappe.utils.get_datetime
- frappe.utils.add*to*date
- frappe.utils.now

Examples:

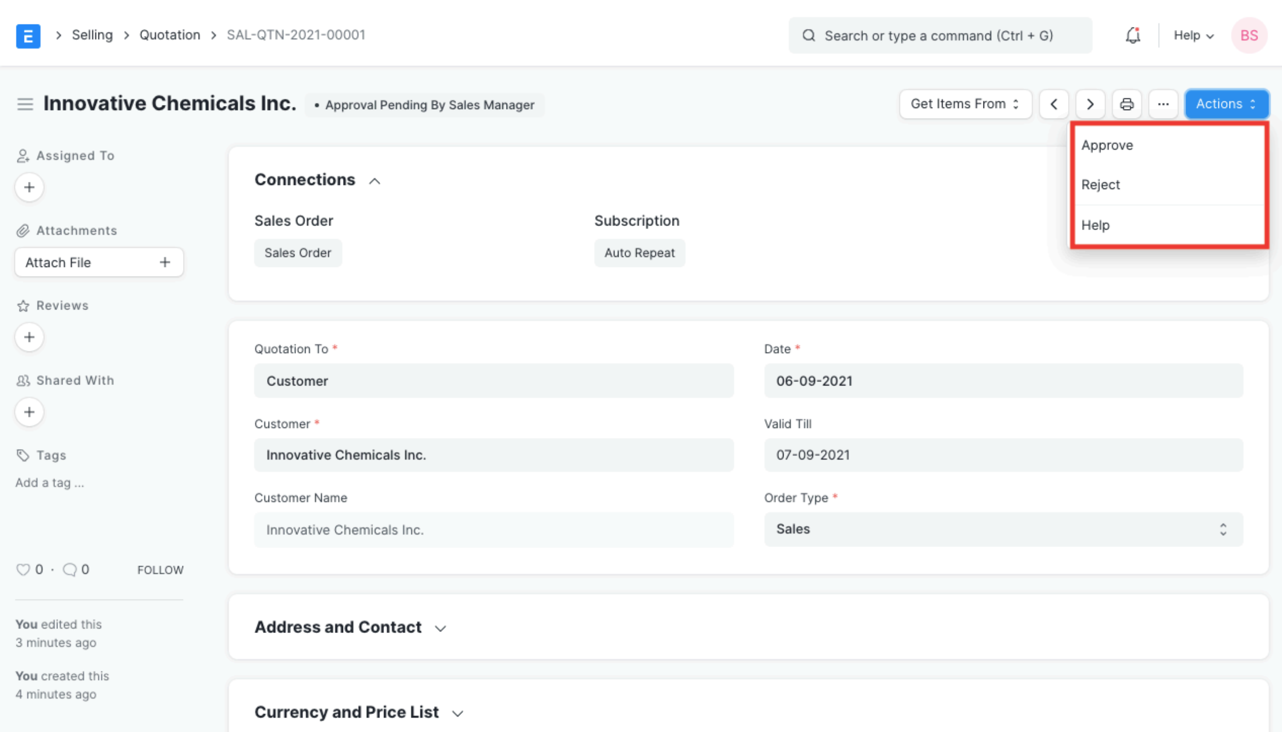
doc.creation > frappe.utils.add_to_date(frappe.utils.now_datetime(), days=-5, as_string=True, as_datetime=True)

4. Example of a Quotation Approval Process

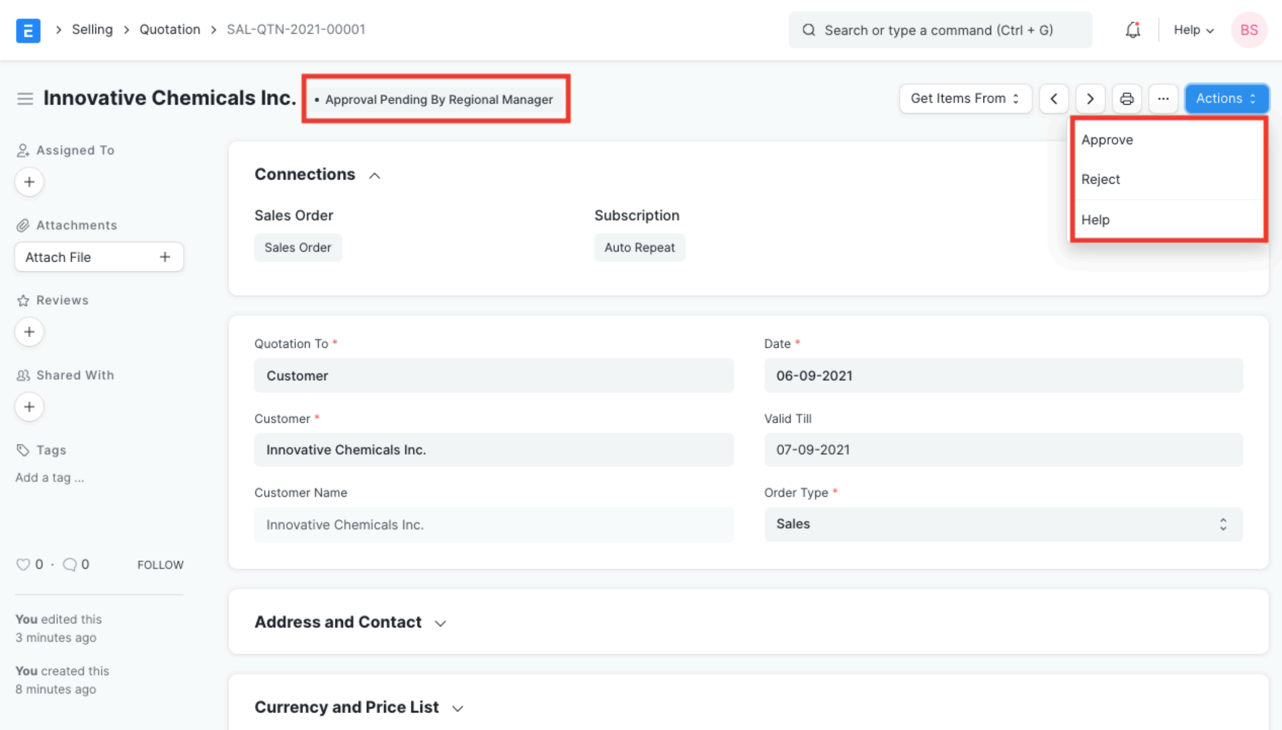
When a quotation is saved by sales user, the status of the document changes to "Draft" and when clicked on submit the status changes to 'Approval Pending By Sales Manager':



When the Sales Manager logs in, he can either Approve or Reject. If approved the status of the document changes to "Approval Pending By Regional Manager".



When the Regional Manager opens the quotation, he can finally "Approve" or "Reject" it.



➢ Workflow Actions

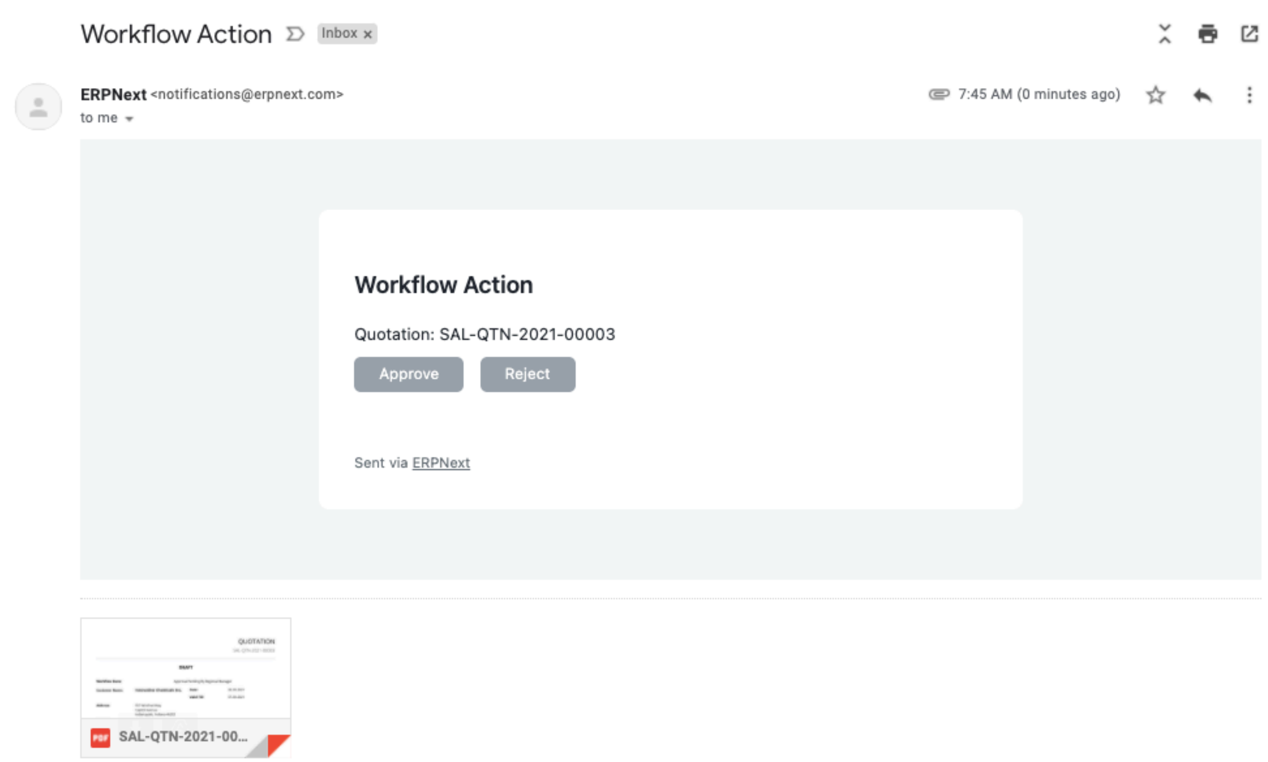
Workflow Actions is a single place to manage all the pending actions you can take on Workflows.

Workflow Actions will send email notifications only if the 'Send Email Alert' checkbox is ticked in the Workflow that you've created.

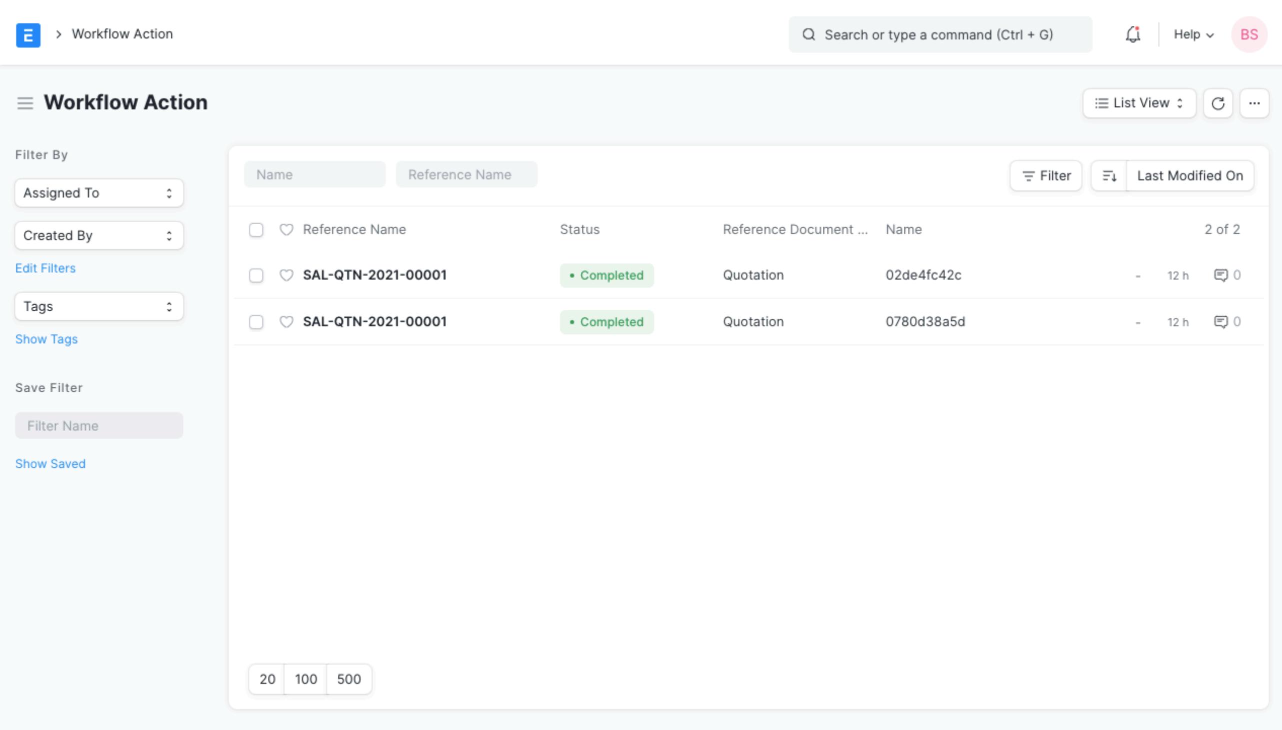
To access Workflow Actions, go to:

Home > Settings > Workflow Actions

If a User is eligible to take action on some workflows, emails will be sent to the user with the relevant document as attachment. From there the user can Approve or Reject the Workflow.



Also the users will see entries in their Workflow Action list:



Note:

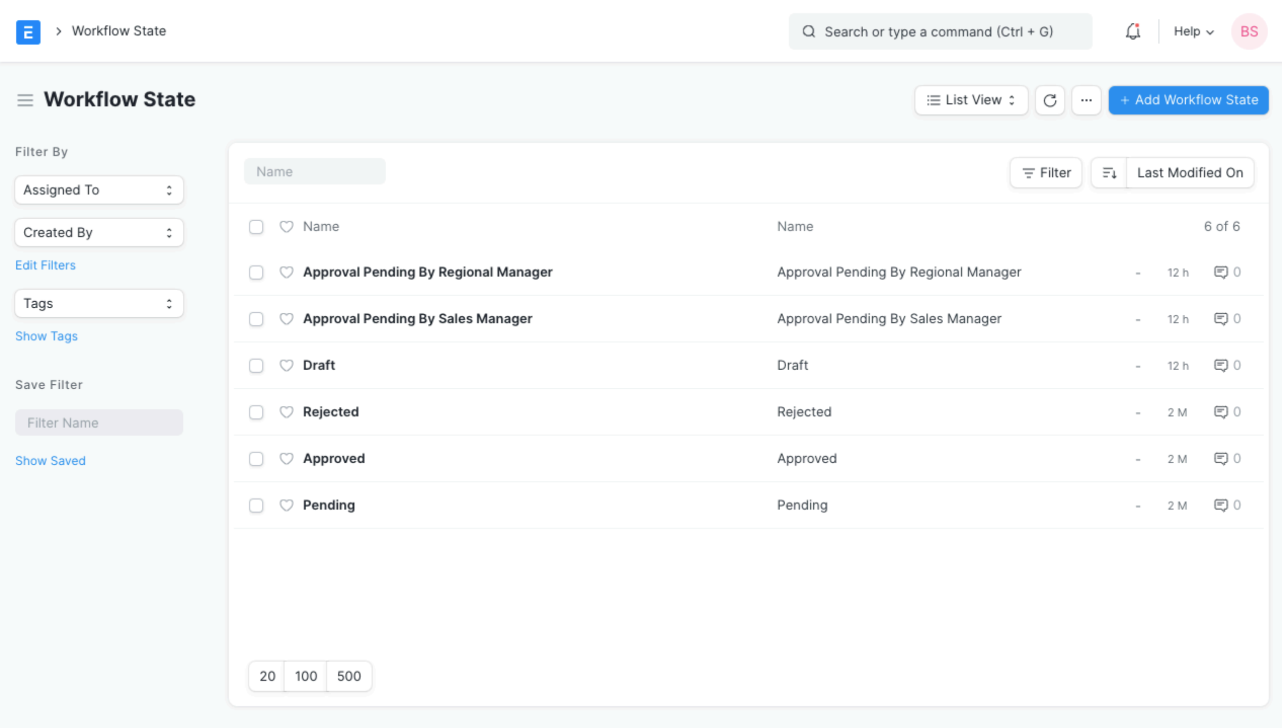
- You can set email template for Workflow Actions on each state. The template might consist of a message for users to proceed with the next Workflow Actions.
- Workflow Actions will not be created for a transition to optional states.

➢ Workflow State

A Workflow State is a state in the workflow you create.

Different Workflow States may be achieved before or after applying different Workflow Actions on them. If you want to create a Workflow where there are multiple approvals from manager, senior manager, general manager, etc, you can set the states for it from Workflow States.

By default, the following Workflow States are created in ERP:



The Workflow States can have different colors according to the state.

- Success - Green
- Danger - Red
- Inverse - Black
- Primary - Dark Blue
- Info - Light Blue
- Warning - Orange

Document statuses:

- Saved = 0
- Submitted = 1
- Canceled = 2

EMAIL

➢ Email setup

Email is at the heart of electronic communication and ERP is deeply integrated with Email. You can create multiple email accounts, automatically create transactions like Lead, Issue from incoming emails, send documents to your contacts via ERP. You can also setup email digests and email alerts to send you reminders.

➢ Email Domain

An email domain is the name of the network/service you're using for your email account.

You can skip to Email Account creation if you are using one of the services listed here.

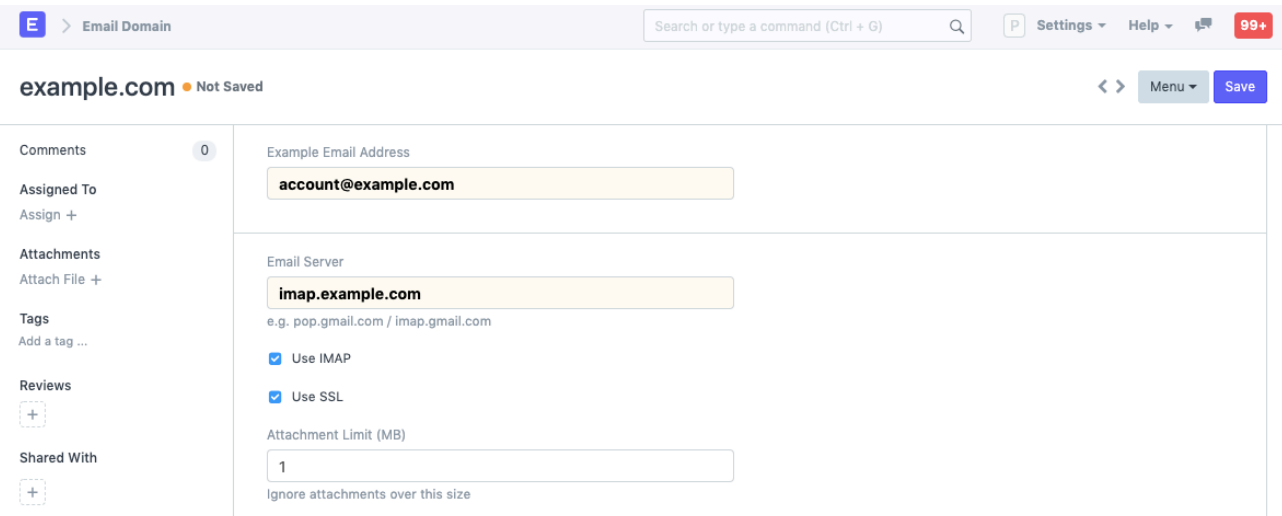
You can configure your Email Domain in ERP for easy setup of all Email Accounts. To find Email Domain settings go to:

Home > Settings > Email Domain

What is my Email Domain?: You might have purchased an Email service from your internet service provider or your IT services provider. For example, if you access your business mailbox with URL like http://mail.yourcompany.com, then yourcompany.com is your email domain.

If you want to send and receive emails on your ERP account, you need to correctly setup an email domain. You may be using free mail services like GMail or Yahoo. In this case, you don't need to create a domain, instead select a service provider from the list. However, you might have to allow access to ERP for your GMail account.

ERP creates a template email domain using example.com for your reference. You should add your new domain if you want to use it in your ERP account.



1. How to create an Email Domain

1. Go to the Email Domain list, click on New.
2. Enter the Example Email Address. This is where you enter your business email address. For example, if your email ID is yourname@yourcompanyname.com you should enter this.
3. Email Server. This is the URL of your mail server or the email service that you have purchased. For example, it may be mail.yourcompany.com or imap.yourcompany.com.
4. Use IMAP. IMAP and POP are two services used by most mail servers for incoming emails. If your Email server allows IMAP service for the incoming emails keep this checked. Otherwise, leave this unchecked.
5. Use SSL. If your mail server uses SSL (Secure Socket Layer) communication keep this checked.

Do I have SSL?: You may have purchased SSL certificate from your IT service provider for SSL and they may have set up SSL for your mail server. If you're using 'https' while accessing mail server over browser then you might have SSL setup.

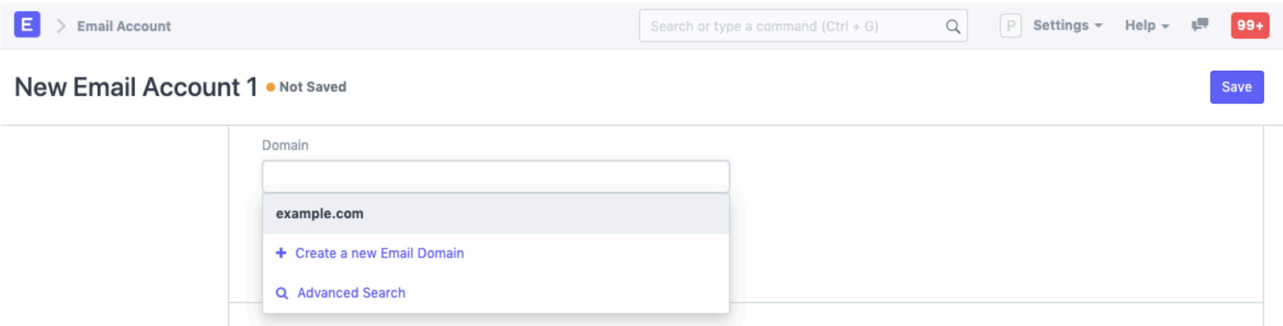
6. Use SSL for Outgoing. If your mailserver uses SSL for outgoing, enable this to explicitly use SSL for outgoing emails. Defaults to port

465.

7. Append Outgoing Email to Sent Folder. If you are not using standard mailservers provided by GMail and similar services, you might need to enable this option to append all outgoing emails to the email account's inbox. (Recommended for email servers like Zimbra and CPanel).
8. Attachment Limit (MB). You can limit the size of file attachments in emails sent from ERP.
9. SMTP Server is the outgoing email service address of your email server.
10. Tick Use TLS if your SMTP service supports TLS for security.
11. Default port. SMTP service is usually set on port 25. If your email server is set up on a separate port number you can set that up here.

1.1 After saving the domain

Once you click on save, these settings are validated by ERP and the Email Domain gets saved. Sometimes this could take a few seconds and you might have to wait. This email domain is then available in a dropdown called Domain in the Email Accounts screen.



Entered everything but still unable to setup Email Domain?

If you've entered and verified the above settings and are still unable to setup Email Domain, you can contact ERP support within your account for help.

➢ Email Account

You can sync your email account with ERP to send and receive emails from ERP.

You can manage multiple incoming and outgoing Email Accounts in ERP. There has to be at least one default outgoing account and one default incoming account. If you are on the ERP cloud, the default outgoing email is set by us.

To access Email Accounts, go to:

Home > Settings > Email Account

1. Prerequisites

Before creating an Email Account, you need an Email Domain. However, you can skip creating an Email Domain if you're using one of the services listed here.

2. How to create an Email Account

1. Go to the Email Account list, click on New.
2. Enter the email address with the domain. Domains need to be created in order to create an email account. You don't need to create a domain if you're syncing an email from certain providers as listed here.
3. Enter the email account password.
4. Save. If the credentials are correct, the email account will be synced.

Note: For some services like Gmail, you may need to turn on the settings to allow less secure apps.

2.1 Additional options when creating an Email Account

1. **Use Different Email Login ID**: To use an alternative email login and password to access this account. For example, if you have notifications@example.com and you want users to access this email with an alternate email ID, they should tick this checkbox.

The recipients will see notifications@example.com as the sender.

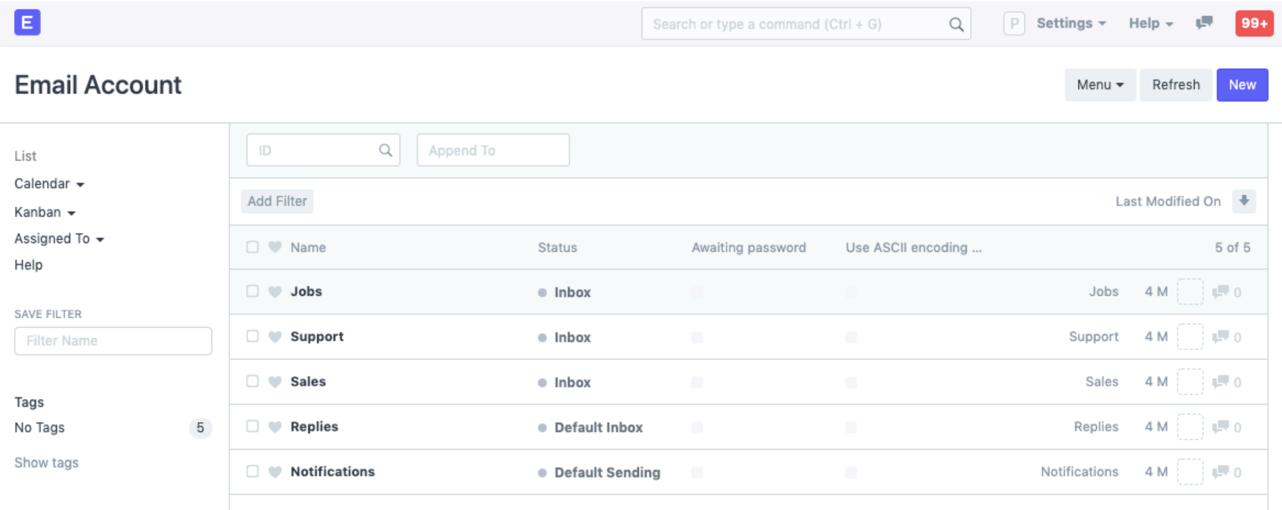
2. **Awaiting password**: If you're creating this account on behalf of someone and the password is unknown, tick this checkbox. When the other user logs in, they'll be prompted to enter the password.
3. **Use ASCII encoding for password**: Ticking this will use ASCII encoding for the password.

3. Configuration of the Email Account

3.1 Default Email Accounts

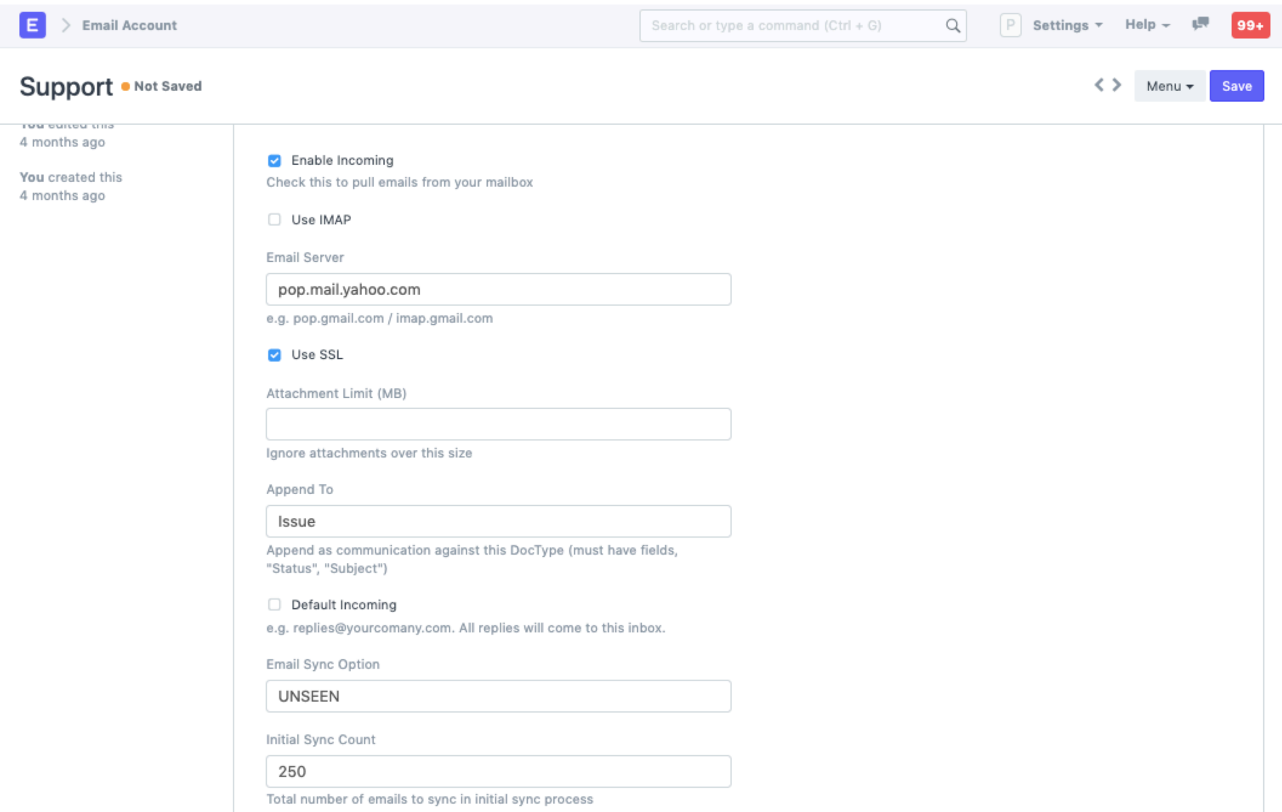
ERP will create templates for a bunch of email accounts by default. Not all of them are enabled. To enable them, you must set valid email account details.

There are two types of email accounts, outgoing and incoming. Outgoing email accounts use an SMTP service to send emails and emails are retrieved from your inbox using an IMAP or POP. Most email providers such as Gmail, Outlook, or Yahoo provide these services.



3.2 Incoming Email Accounts

To set up an incoming Email Account, check on **Enable Incoming** and set your POP3 settings, if you are using a popular email service, these will be preset for you.



The following options are available for incoming emails:

1. **Use IMAP**
2. **Use SSL**
3. **Attachment Limit**
4. **Default Incoming**: If ticked, all replies to your company (eg: replies@yourcomany.com) will come to this account.
5. **Email Sync Option**: Whether to sync all or only unseen emails.
6. **Initial Sync Count**: Number of emails to sync the first time.

Appending Emails To Documents

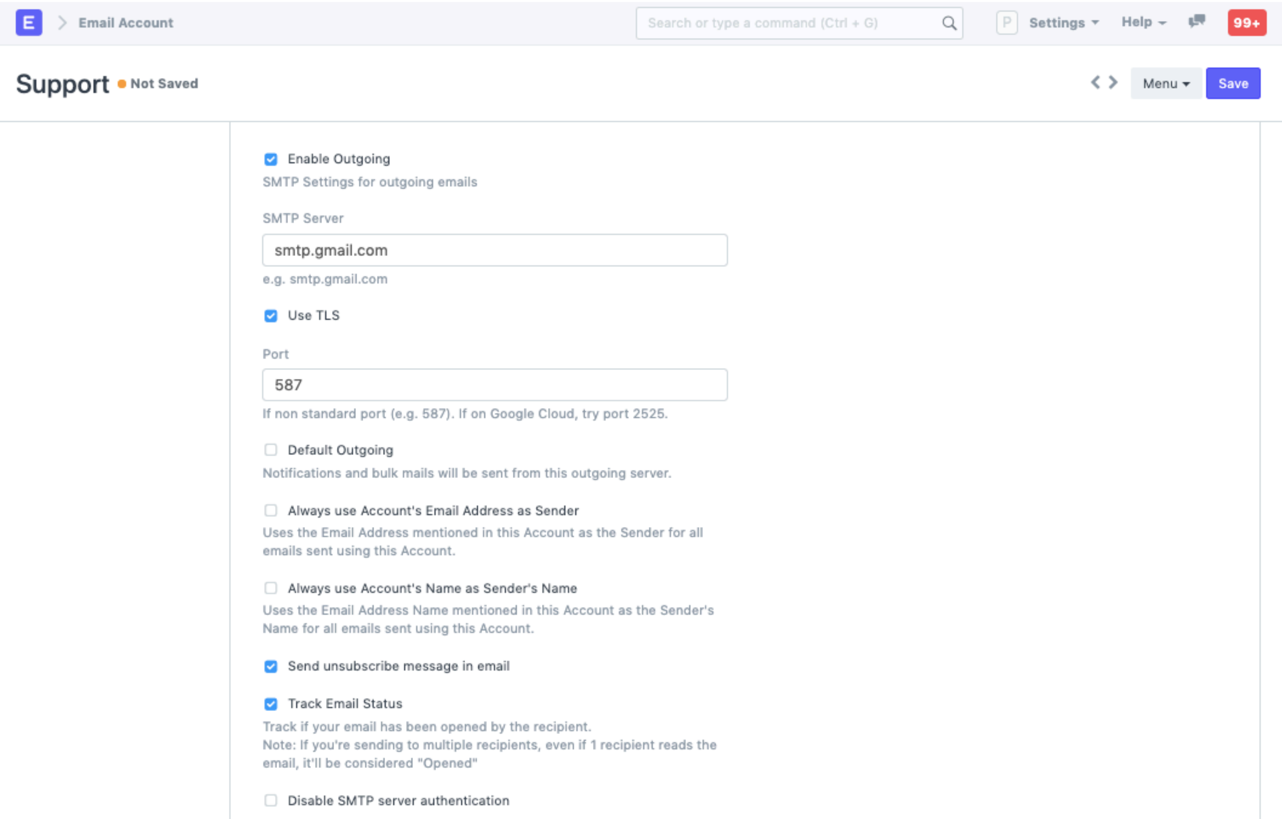
This feature creates documents when an email is sent to a particular email account. For example, you can append support@example.com to the Issue DocType. On doing this, whenever an email is sent to support@example.com, the system will create an Issue for it. Similarly, if you link jobs@example.com, when emails are sent to jobs@example.com, a Job Applicant document is created.

Enable Automatic Linking in Documents will link emails to documents, to know more click here.

3.4 Outgoing Email Accounts

All emails sent from the system, either by the user to contact or via notifications or via transaction emails, will be sent from an Outgoing Email Account.

To set up an outgoing Email Account, check on **Enable Outgoing** and set your SMTP server settings, if you are using a popular email service, these will be preset for you.



The following options are available for outgoing emails:

1. **Use TLS**
2. **Port**
3. **Disable SMTP server authentication**
4. **Add Signature**: The default signature is appended to the end of each email.
5. **Default Outgoing**: Notifications and bulk emails will be sent from this outgoing server.
6. **Always use Account's Email Address as Sender**: The email address of this account will be mentioned as the sender for outgoing emails.

7. **Send unsubscribe message in an email**: Send a link to unsubscribe from emails sent from this account.
8. **Track Email Status**: Track if your email has been opened by the recipient. Note that, if you're sending to multiple recipients, even if one recipient reads the email, it'll be considered "Opened".
9. **Enable Auto Reply**: If enabled, enter an auto-reply message.
10. **Append Outgoing Email to Sent Folder**: If using custom email servers like Zimbra or CPanel, SMTP will not automatically append emails to the Sent folder. Enabling this option will ensure all emails are explicitly appended to the email account's Sent folder.
11. **Use SSL for Outgoing Emails**: Use SSL as a standard for outgoing emails. Defaults to port 465.

4. How ERP handles replies

In ERP when you send an email to contact like a customer, the sender will be the user who sent the email. In the **Reply-To** property, the Email Address will be of the default incoming account (like replies@yourcompany.com). ERP will automatically extract these emails from the incoming account and tag them to the relevant communication.

Note for self implementers: For outgoing emails, you should set up your own SMTP server or sign up with an SMTP relay service like mandrill.com or sendgrid.com that allows a larger number of transactional emails to be sent. Regular email services like Gmail will restrict you to a limited number of emails per day.

If you encounter errors when configuring an email account, refer to this page.

➢ Email Inbox

Once an email account is added, the email inbox will be accessible.

Running a business involves many transactional email exchanges with parties like Customers and Suppliers and other members within the company. Email Inbox feature allows you to pull all your business emails into your ERP account. Enabling access to business emails with other transactional details makes ERP a single platform for accessing all business information in one place.

In ERP, you can configure Email Inbox for each System User. Following are the detailed steps to configure Email Inbox for a User.

1. Create a User

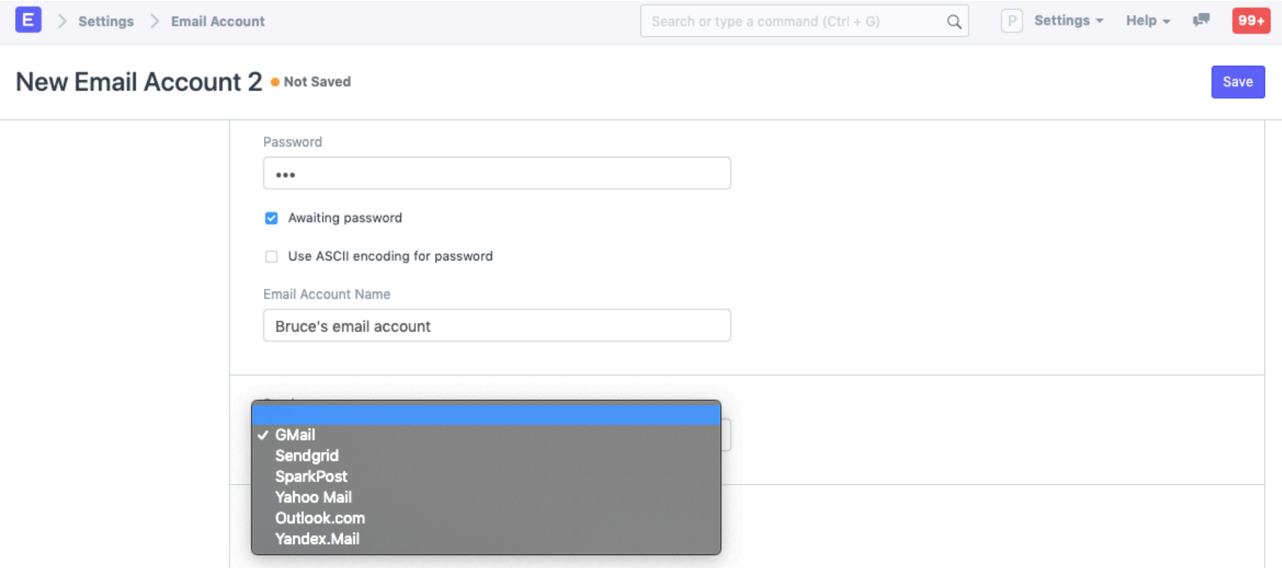
You can configure an Email Inbox for a System User only. Hence ensure that you have added yourself and your colleagues as a User and assigned them required permissions.

To know how to add a new User, go to the User page.

2. Create an Email Domain

Email Domain for the following Services is available out-of-the-box and you can directly proceed to create an Email Account. Know more about creating an Email Domain here.

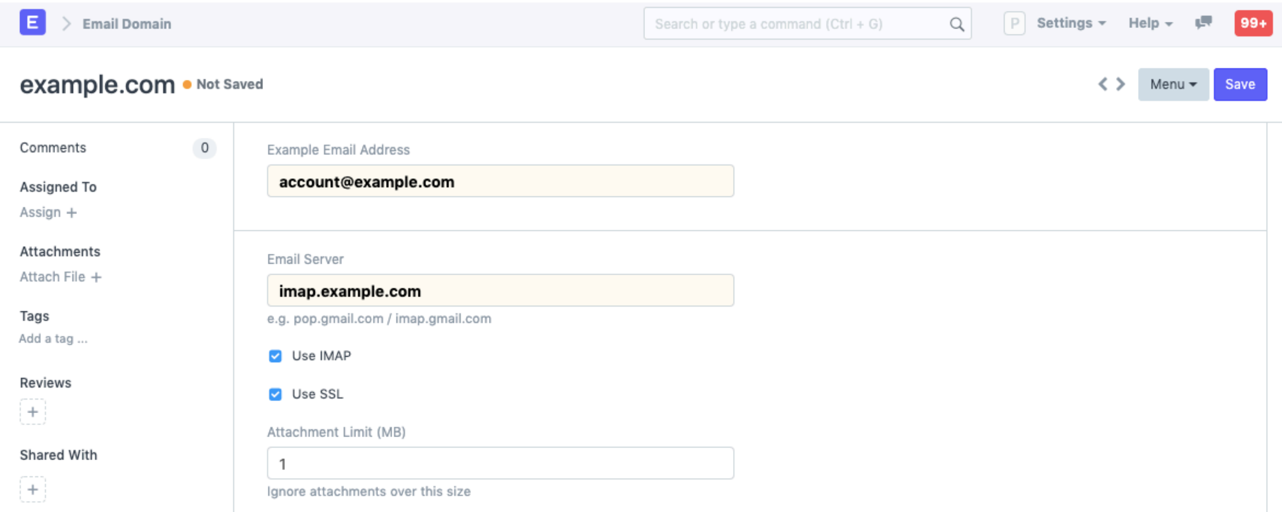
- **Gmail**
- **Yahoo**
- **Sparkpost**
- **SendGrid**
- **Outlook.com**
- **Yandex.mail**



To be able to send and receive emails into your ERP account from other email services (like WebMail or Gmail), you should set up an Email Domain master. In this master, email gateway details like SMTP Address, Port No., IMAP/POP3 address details are captured. If you have ever configured a local email client (like Outlook), Email Domain master requires details to be fed similarly.

To add new Email Domain, go to:

Home > Settings > Emails > Email Domain > New

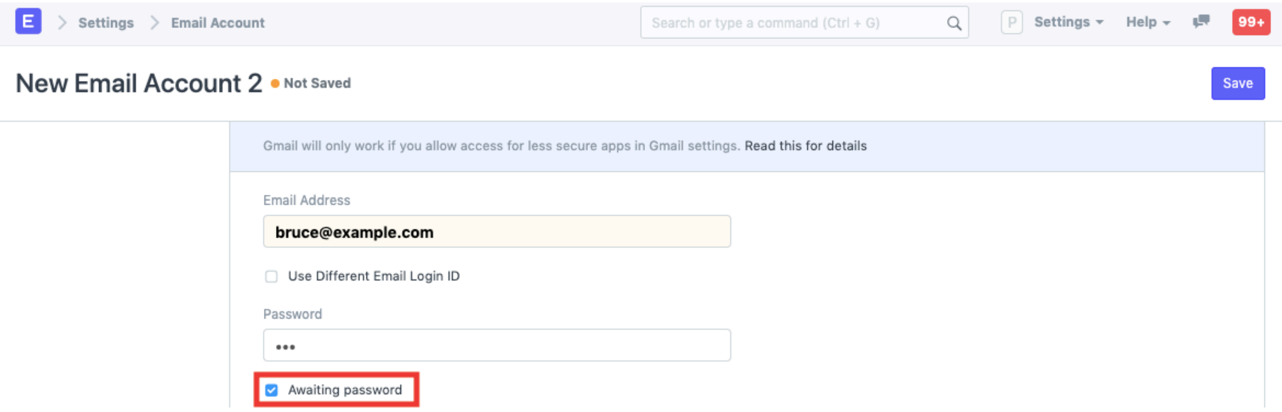


Know more about Email Domains here. Once you have configured an Email Domain for your Email Service, it will be used for creating Email Accounts for all the Users in your ERP account.

3. Email Account

Create an Email Account based on the Email ID of the User. For each User whose email account is to be integrated with ERP, an Email Account master should be created for it.

If you are creating an Email Account for your colleague who's Email Password is unknown to you, then check field "Awaiting Password". As per this setting, a User (for whom Email Account is created) will get a prompt to enter email password when accessing his/her ERP Account.

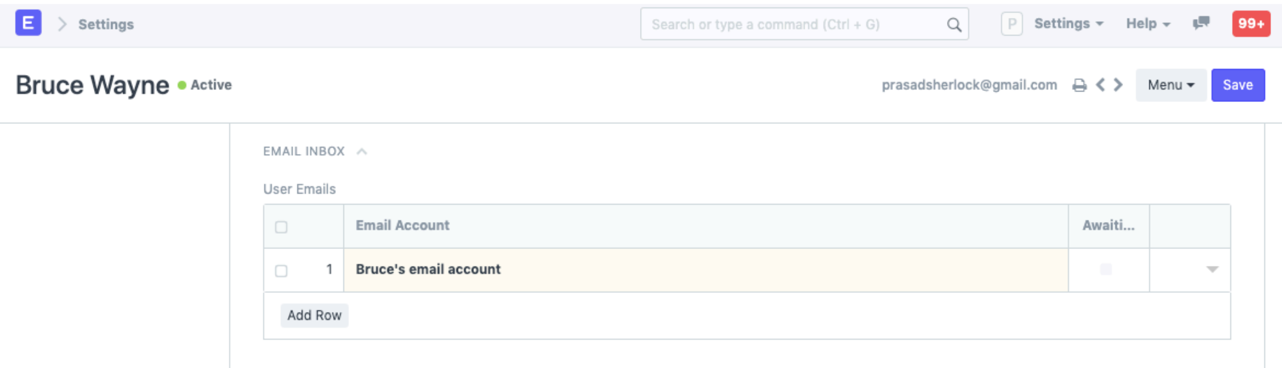


If you are creating an Email Account for Email Inbox of a User, then leave Append To field as blank.

Read [Email Account documentation] for more details on how to setup.

4. Linking Email Account in the User master

Once an Email Account is created for a User, select that Email Account in the User. This will ensure that emails pulled from the said Email ID will accessible only to this User in your ERP account.



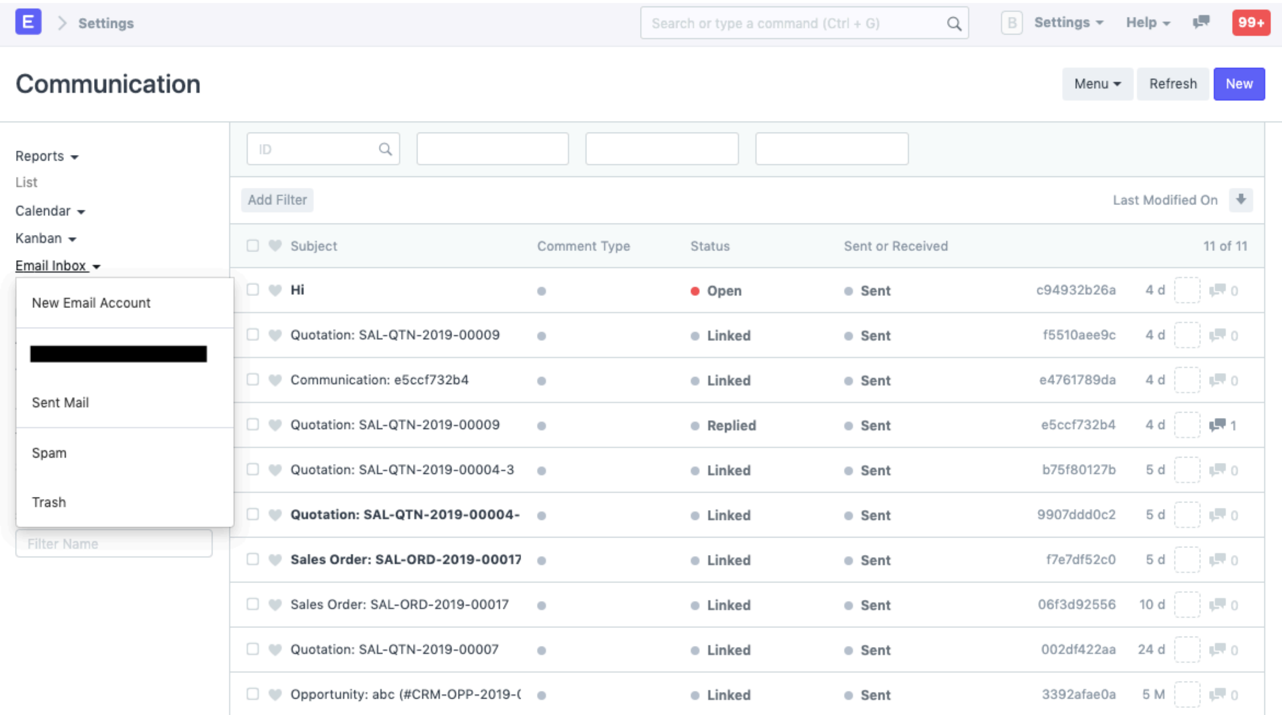
You can link multiple emails with one user.

5. Using Email Inbox

If you have correctly configured Email Inbox as instructed above, then on the login of a User, Email Inbox icon will be visible. This will navigate the user to Email Inbox view within the ERP account. All the Emails received on that email will be fetched and listed in the Email Inbox view. User will be able to open emails and perform various actions on them.

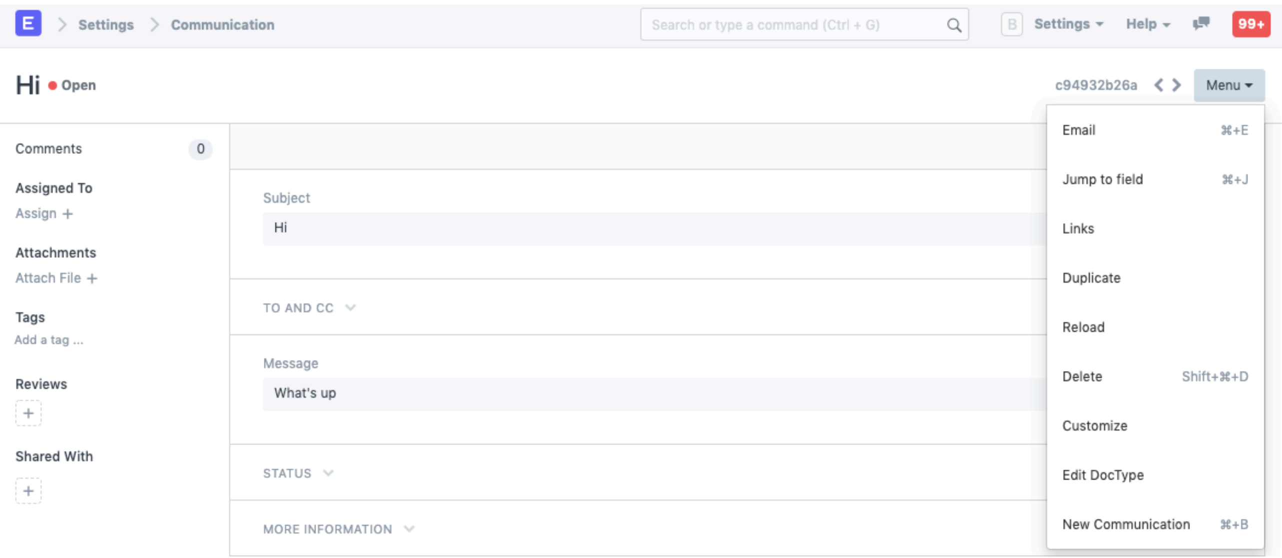
5.1 Folders

In ERP, you can link multiple Email Accounts with the single User. To switch to Inbox of a different email account and access other folders like Sent Emails, Spam, Trash, click on Email Inbox option in the left bar.



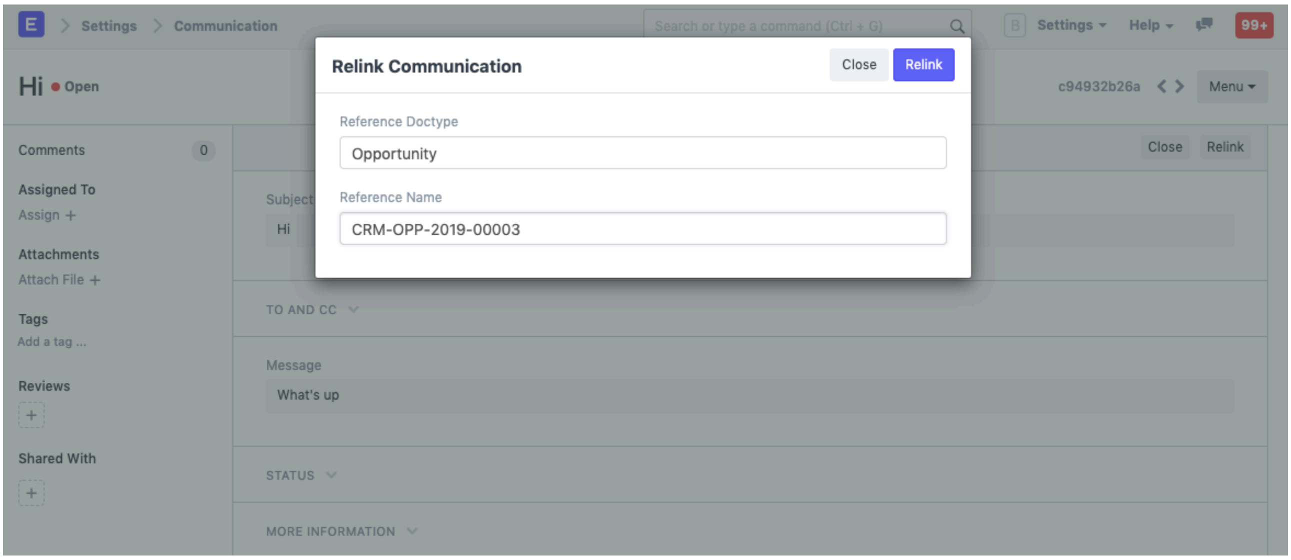
5.2 Actions

On the emails in your inbox, you can take various actions like Reply, Forward, Mark as Spam or Trash.



5.3 Relink

You can relink an email to a document like Issue, Lead, Opportunity, etc. based on the context of the email. Select the document type and the document to link the email to.



➢ Email Template

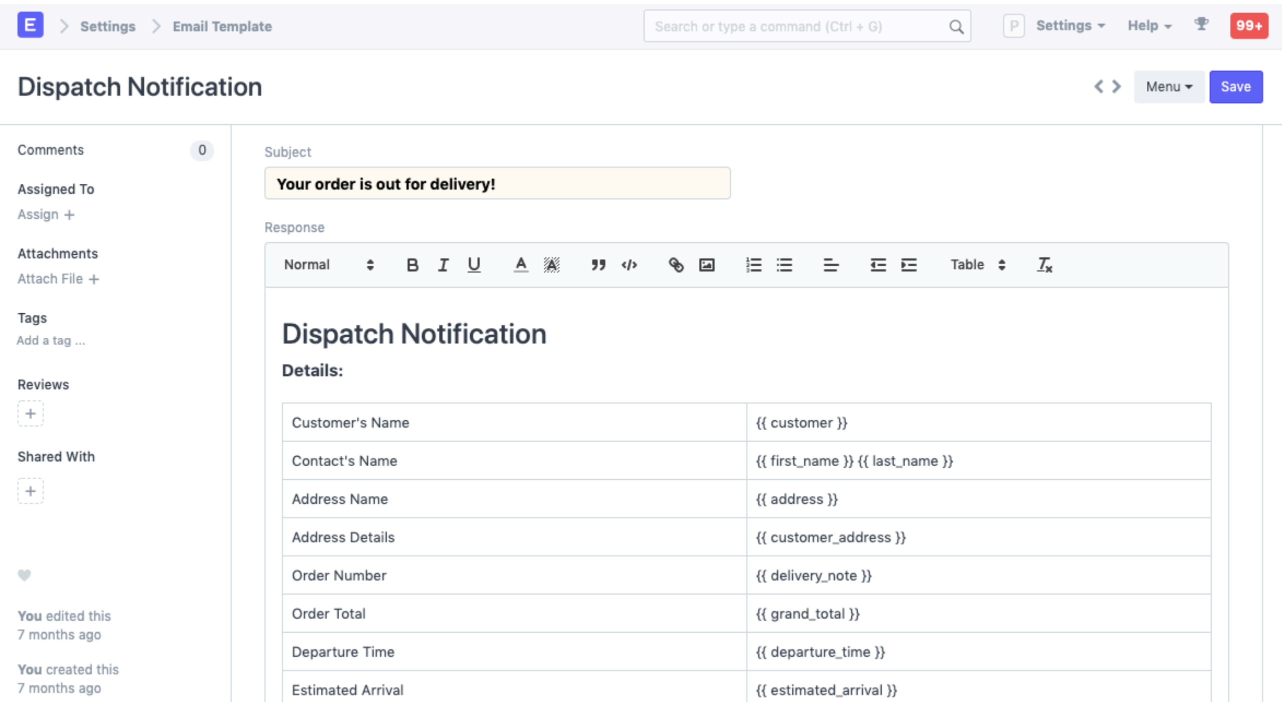
Every email sent is different but certain emails can be standardized, usually known as Email Template or Standard Reply.

To access the Email Template list, go to:

Home > Settings > Email > Email Template

1. How to create an Email Template

1. Go to the Email Template list, click on New.
2. Enter a name for this Email Template.
3. Enter a Subject for this Email Template.
4. Response is the standard content of the email that will be a part of this template.
5. Save.



DocType Associated: (optional) The DocType associated with this template.

1.1 How to use Email Template

You can use this Email Template in the Emails that are sent from ERP in the "CC, BCC & Email Template" field of the email section of the document. ERP will fetch the subject and response as per the template selected.

You can set a Default Email Template for each document type via Customize Form.

1.2 How to get fieldnames

The fieldnames you can use in your email template are the fields in the document from which you are sending the email. You can find out the fields of any documents via Customize Form and selecting the document type (e.g. Sales Order)

1.3 Using HTML to build the template

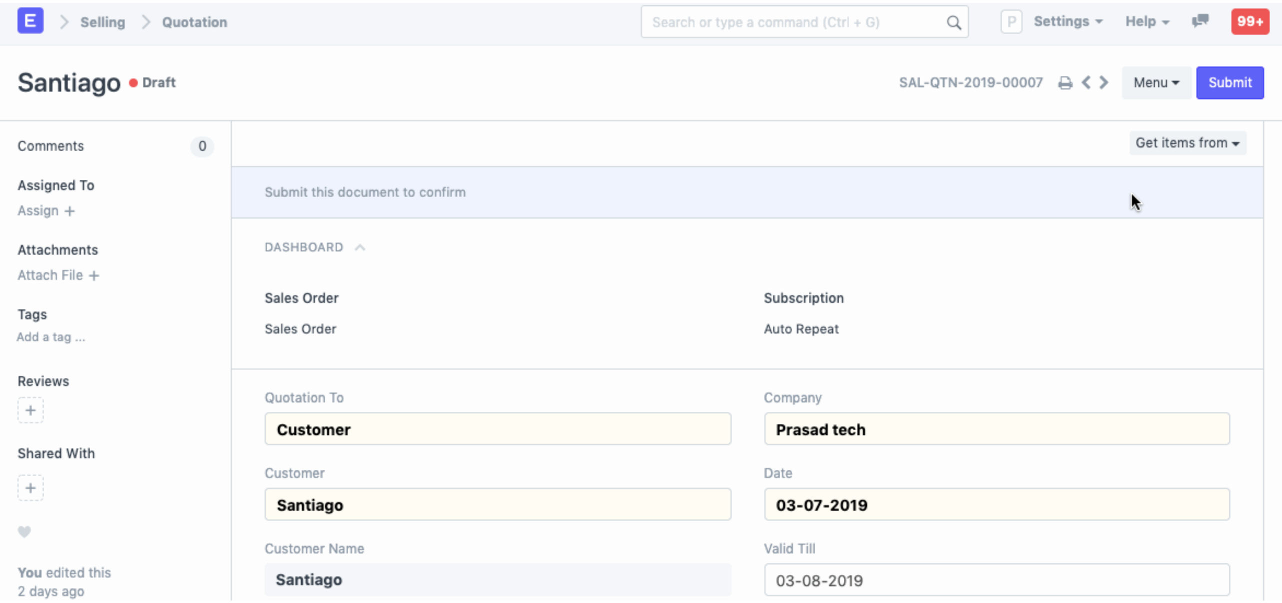
There's a Use HTML check that you can toggle to switch from the text editor to a code editor. This allows finer control over the body of the email and makes it easier to use for features like loops in Jinja.

1.4 Templating

Templates are compiled using the Jinja. To learn more about Jinja, visit this page.

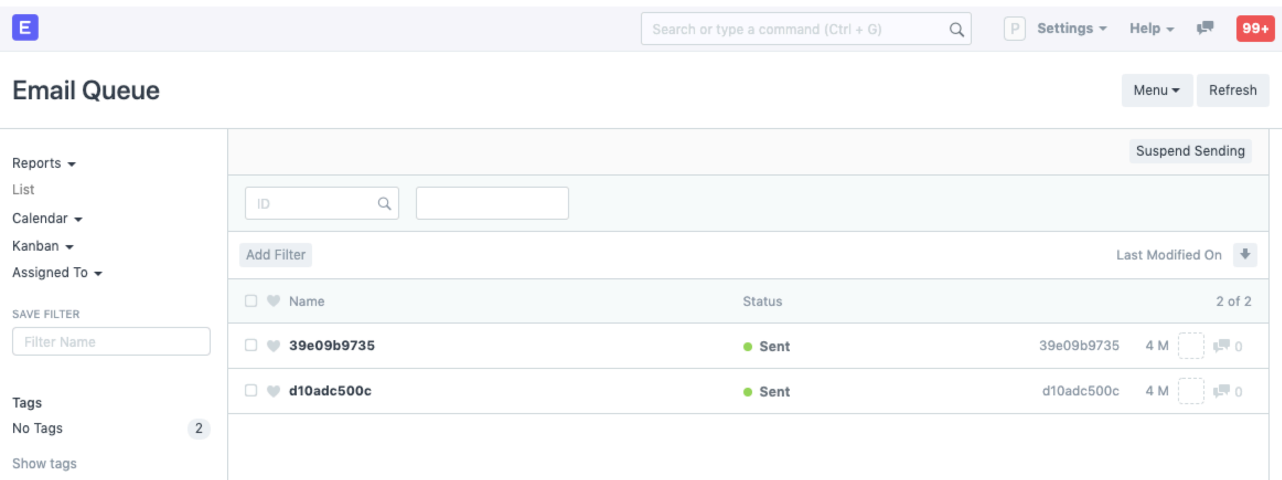
➢ Sending Email from any Document

In ERP you can send any document as email (with a PDF attachment) by clicking on Menu > Email after opening any document.



Note: You must have outgoing Email Accounts set up for this.

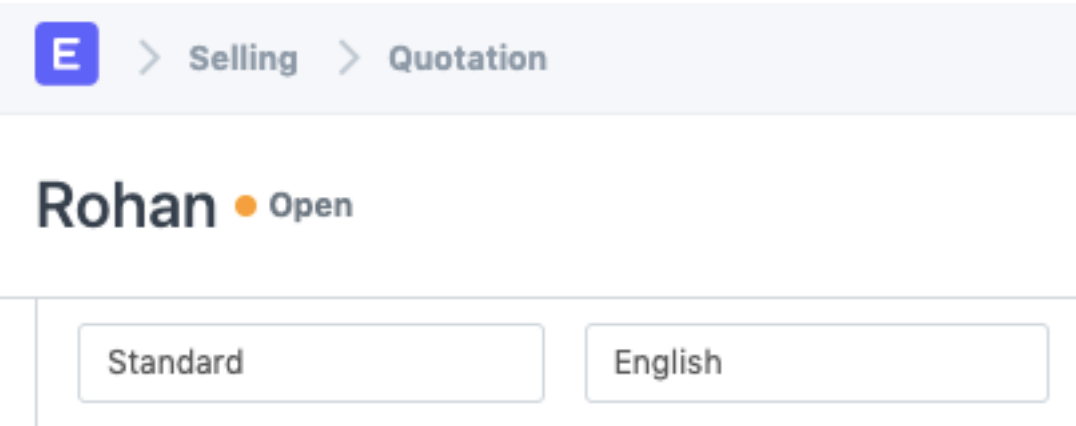
After you click on send, the email gets added to the email queue. It will be in the Sending status until it is Sent. The status of the email is displayed in the queue, if sending has failed, it can be sent by clicking on Send Now.



The following options are available when sending an Email.

- **CC**: Carbon Copy of the email. Useful when you want to keep someone in the conversation loop but don't want to address the email directly to them.
- **BCC**: Blind Carbon Copy is similar to CC but everyone else on the email thread cannot see that the mail was also sent to the BCC recipients. This is useful to hide the email address of certain people if you're sending the email to a lot of people who don't necessarily know each other.
- **Email Template**: You can create preset templates to send out standard replies. Email Templates are already available in the system for Dispatch Notification, Leave Status Notification, and Leave Approval Notification. You can set a Default Email Template via Customize Form.
- **Send me a copy**: This will send a copy to your email address. It's useful to ensure that the email was sent without any errors.
- **Send Read Receipt**: Ticking this checkbox will send you a notification if the receiver has read the email. In case of multiple receivers, even if one has read the email, you'll get a notification.
- **Attach Document Print**: Attach the PDF of the document you're sending via email.
- **Select Attachments**: Any additional attachments can be added here.

The following two fields are the fields which appear on the print screen:



- **Select Print Format**: The print format of the document. Know more about Print Format here.
- **Select Languages**: The language in which the PDF is to be generated.

➢ Linking Emails to Documents

An email can be linked to multiple documents in ERP.

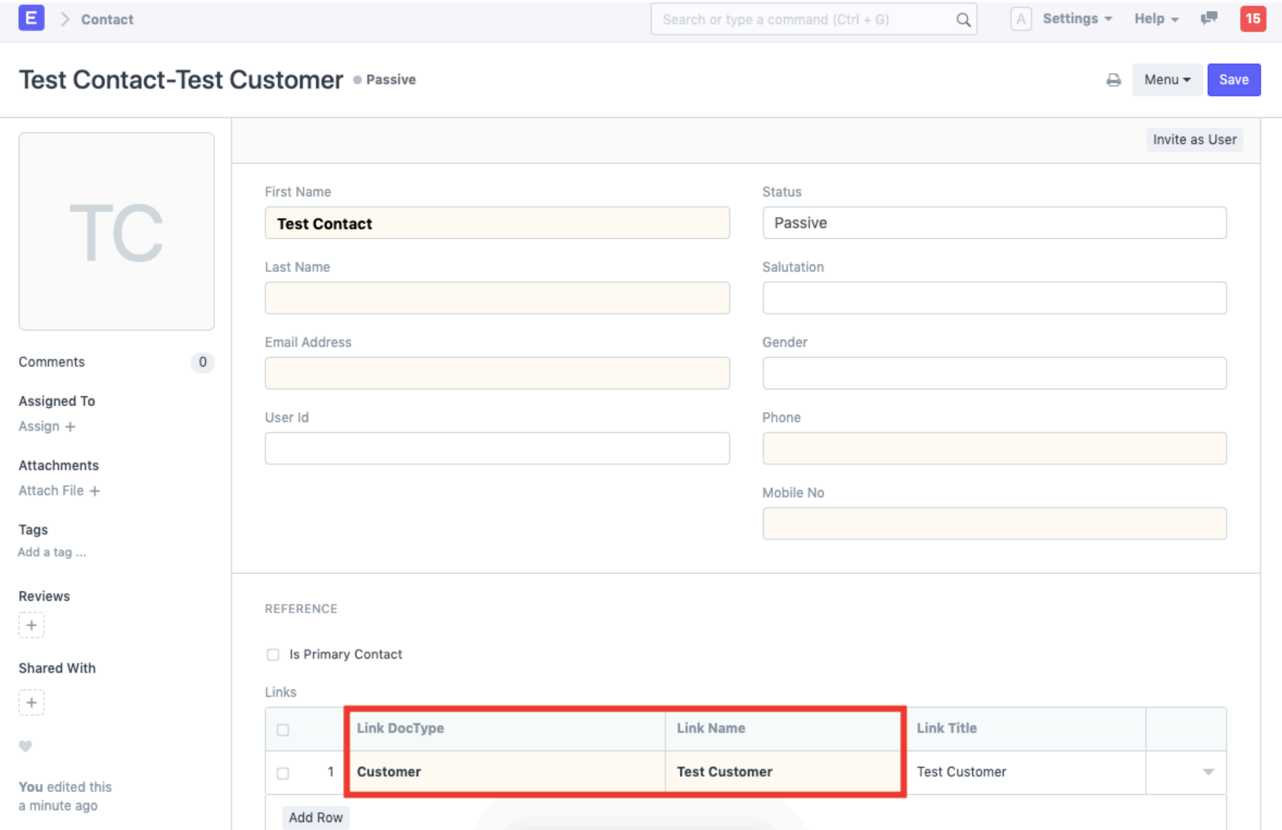
This can be done in the following two ways:

- Email Aggregation in Contact, Customer, Supplier.
- Automatic Email Linking.

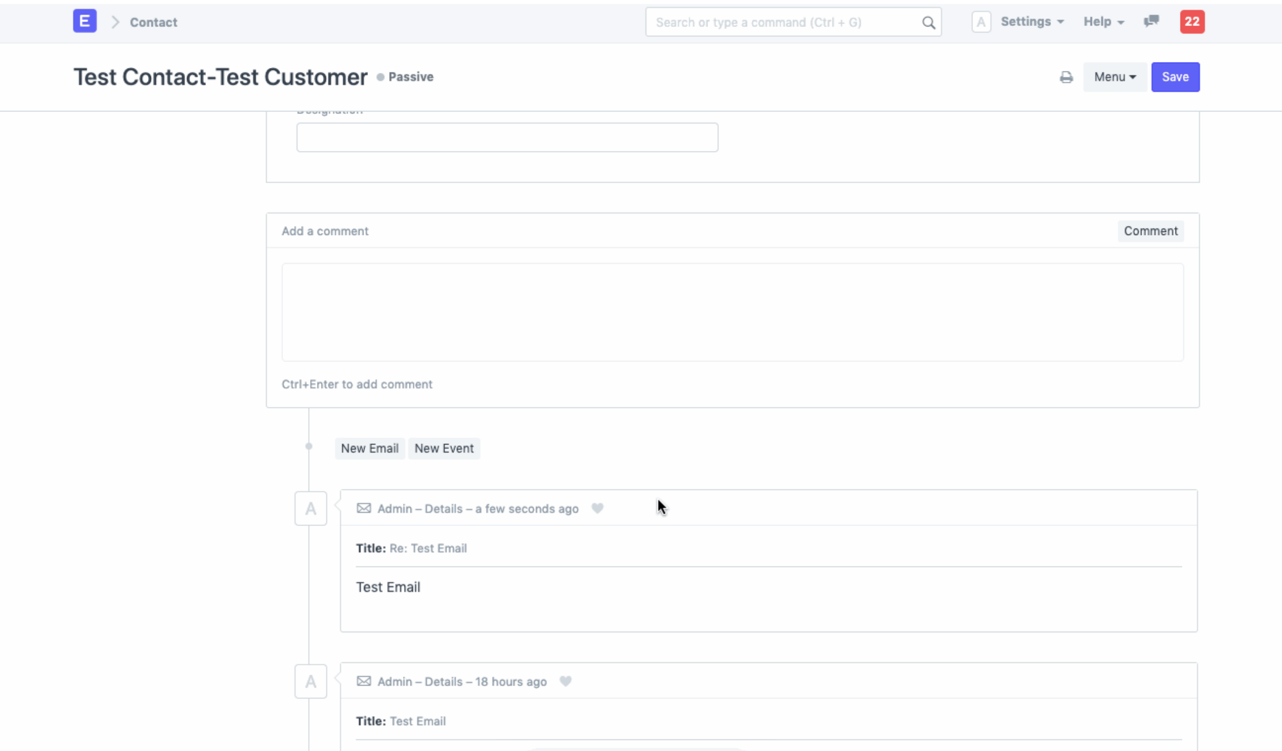
1. Email Aggregation for Customer and Supplier

Email Aggregation takes place in Contact, Customer, and Supplier. All the Emails sent or received from a Contact can be viewed in that Contact's Timeline and as well as linked Customer's or Supplier's Timeline. To enable Email Aggregation, do the following:

1. In a Contact, add Links for the Customer or Supplier respectively.



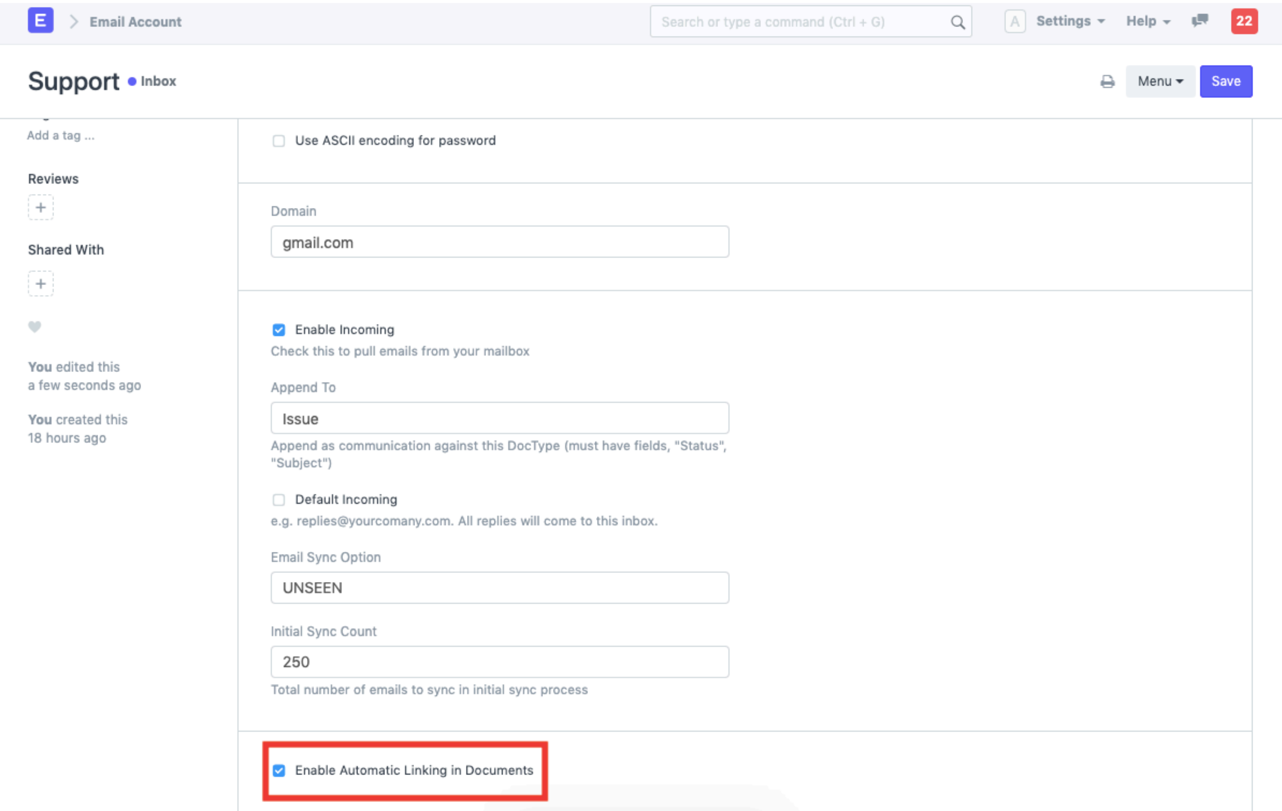
2. Now when an Email is sent to or received from the Contact associated with Customer or Supplier, that email is linked to the Customer or Supplier mentioned in the Links section of the Contact.



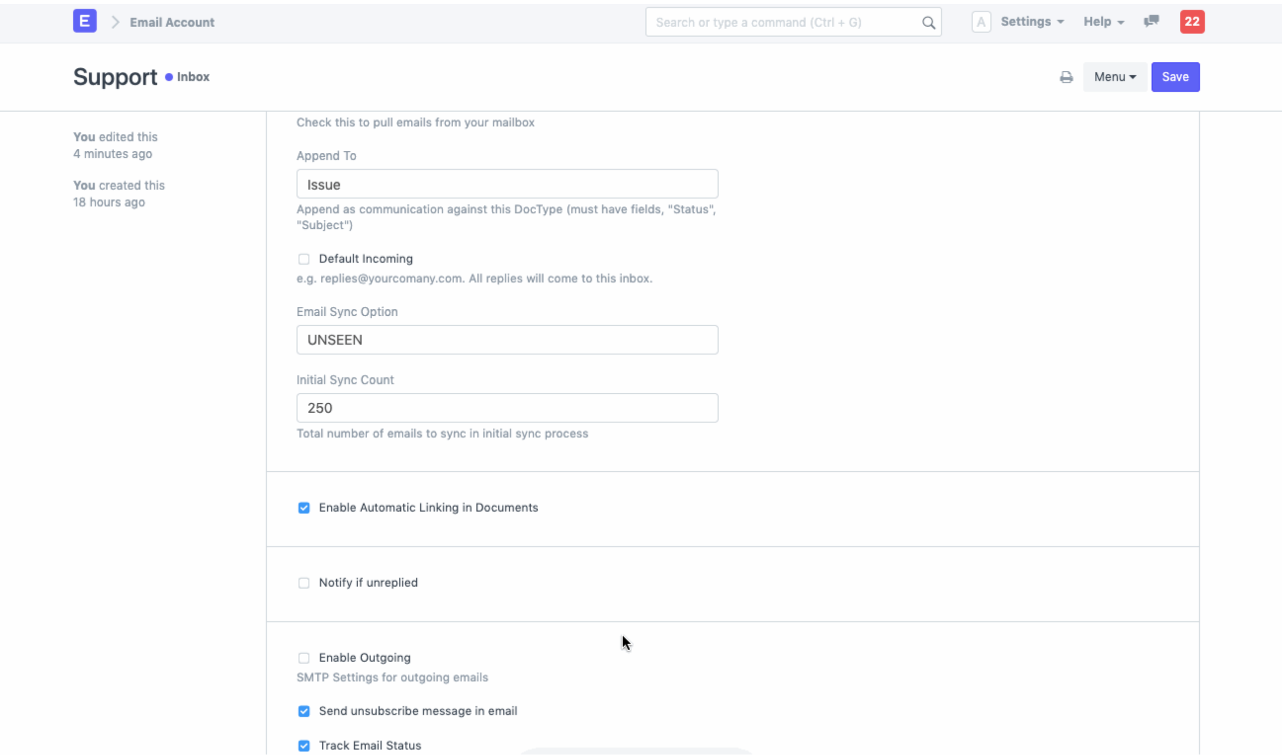
2. Automatic Email Linking to a Document

Automatic Email Linking links an Email to the Document specified in the unique Email Address generated by the system for a document. If an Email is sent or received using the unique Email Address, the system will link that Email to the Document.

1. Enable Automatic Email Linking in Email Account. This feature can be used only with one Email Account at a time.



2. Once this feature has been enabled, you will see a unique Email ID generated using the Email ID mentioned in the Email Account.
3. Now you can copy the Email ID by clicking on it and you can send or receive Emails using the unique Email ID. If an Email contains this unique Email ID either in the Recipients, Cc or Bcc, section, the system will link that Email to the specified Document.



➢ Email Digest

Email Digests allow you to get regular updates about your sales, expenses and other critical numbers directly in your Email Inbox.

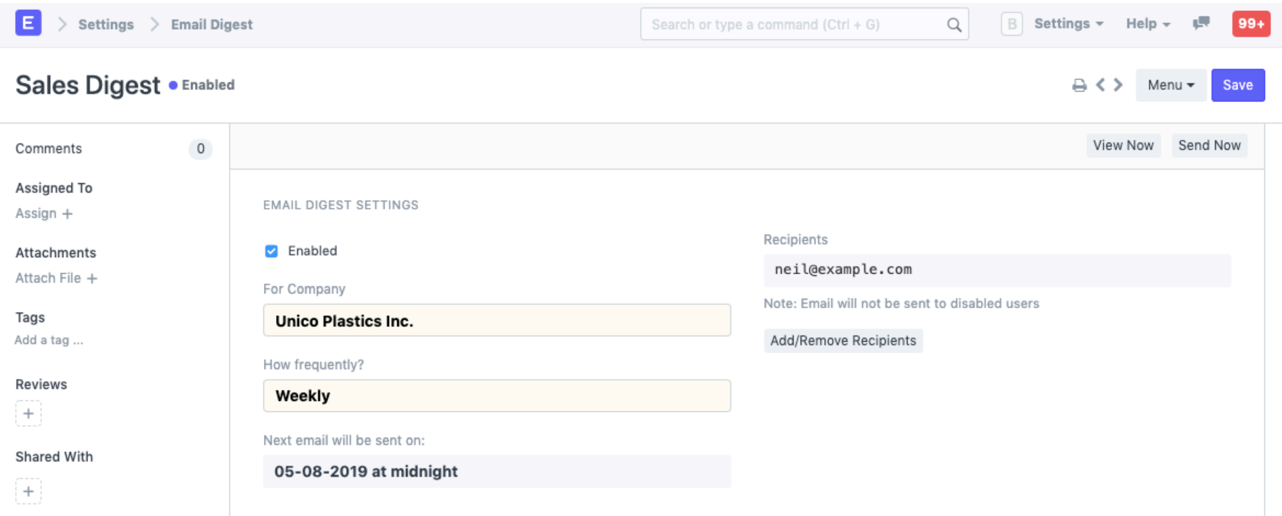
Email Digests are a great way for top managers to keep track of the big numbers like "Sales Booked" or "Amount Collected" or "Invoices Raised" etc.

To set up Email Digest, go to:

Home > Settings > Email Digest

1. Enter a name for the Email digest.
2. Set the frequency of mails to be sent.
3. Add or remove recipients.
4. Select the items to be included in the digest.
5. Save.

Example:



➢ Auto Email Reports

Auto Email Reports automatically sends reports for the selected document.

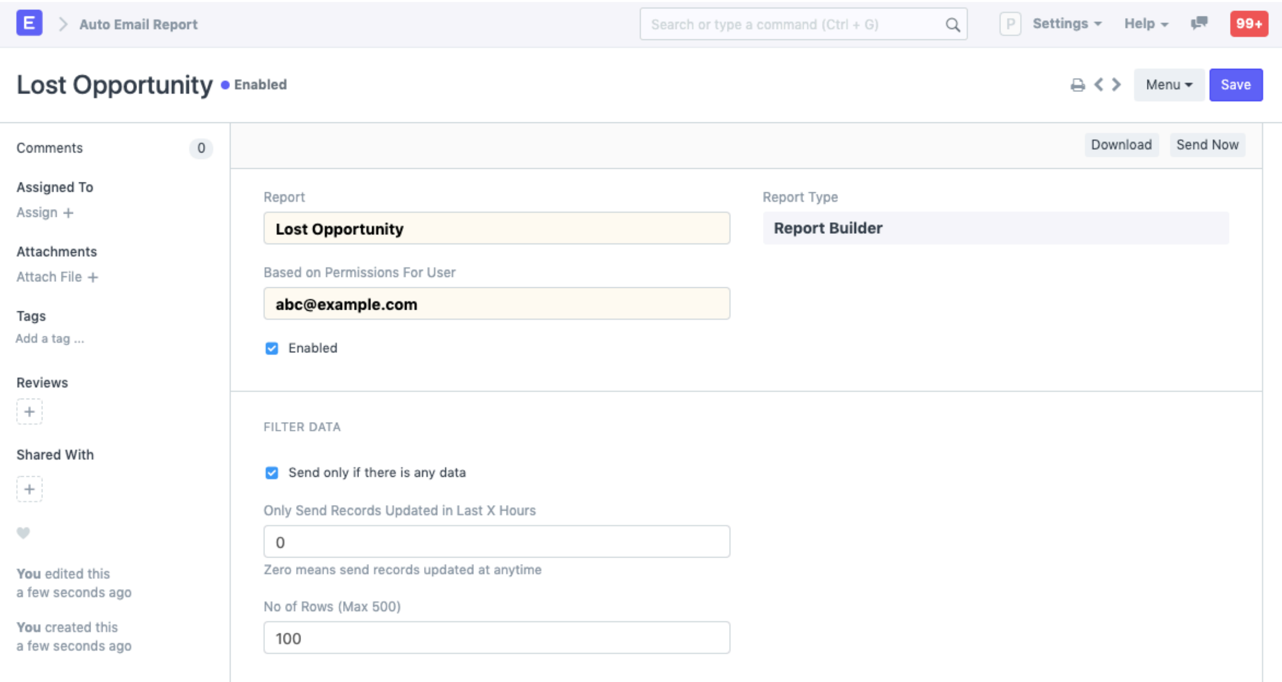
You can setup **Auto Email Report** to send reports at regular intervals. These must be saved reports of any type (Report Builder, Script or Query Report).

You can find Auto Email Report at:

Home > Settings > Auto Email Report

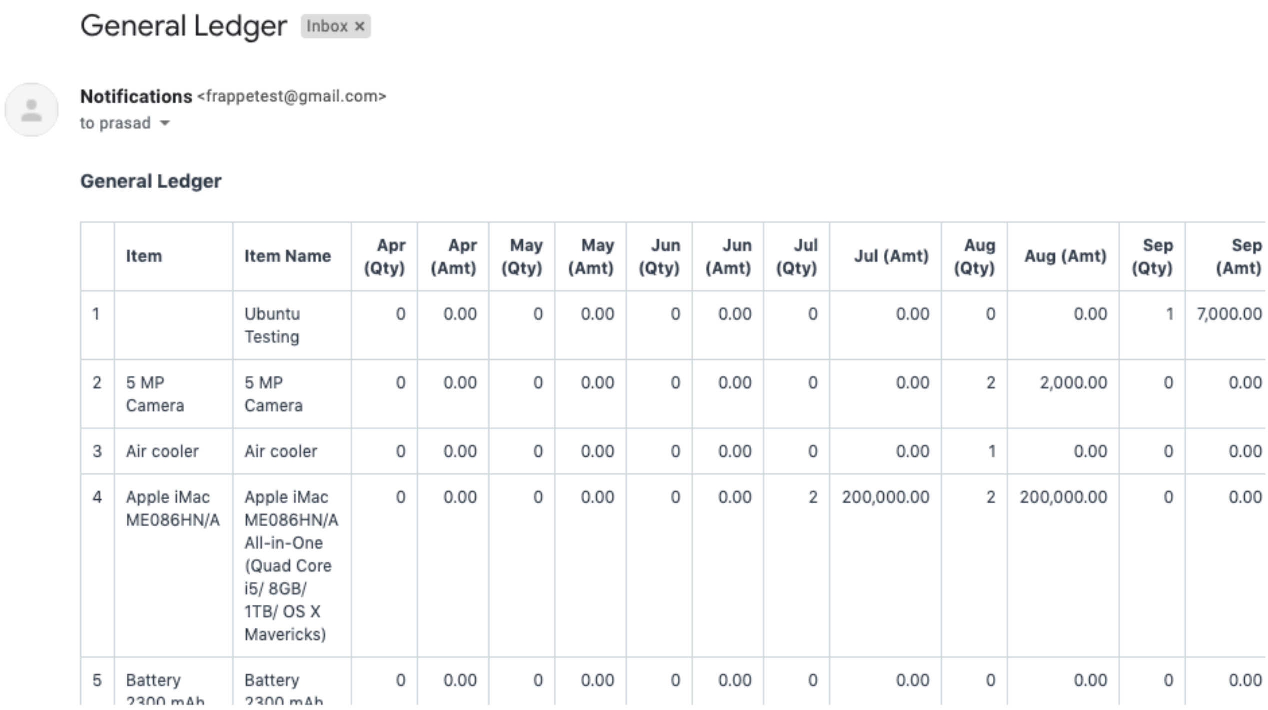
1. How to create an Auto Email Report

1. Go to the Auto Email Report list, click on New.
2. Select the Report for which you want to generate emails.
3. Select the user for which you want to create this report (permissions will apply for this user).
4. Set the Email Addresses to which you want this report to be emailed and the frequency of the report. Emails will be sent at midnight. The date will be repeated in case of weekly/monthly/yearly frequency. For example, if the selected date is 7 and the frequency is monthly, the email will be sent on the 7th of each month.



5. Save.

You can test the report by clicking on "Download" or "Send Now". Here is an example of the email you will receive for a general ledger report:



General Ledger Inbox ×

Notifications <frappetest@gmail.com>
to prasad

General Ledger

	Item	Item Name	Apr (Qty)	Apr (Amt)	May (Qty)	May (Amt)	Jun (Qty)	Jun (Amt)	Jul (Qty)	Jul (Amt)	Aug (Qty)	Aug (Amt)	Sep (Qty)	Sep (Amt)
1		Ubuntu Testing	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	1	7,000.00
2	5 MP Camera	5 MP Camera	0	0.00	0	0.00	0	0.00	0	0.00	2	2,000.00	0	0.00
3	Air cooler	Air cooler	0	0.00	0	0.00	0	0.00	0	0.00	1	0.00	0	0.00
4	Apple iMac ME086HN/A	Apple iMac ME086HN/A All-in-One (Quad Core i5/ 8GB/ 1TB/ OS X Mavericks)	0	0.00	0	0.00	0	0.00	2	200,000.00	2	200,000.00	0	0.00
5	Battery 2300 mAh	Battery 2300 mAh	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00

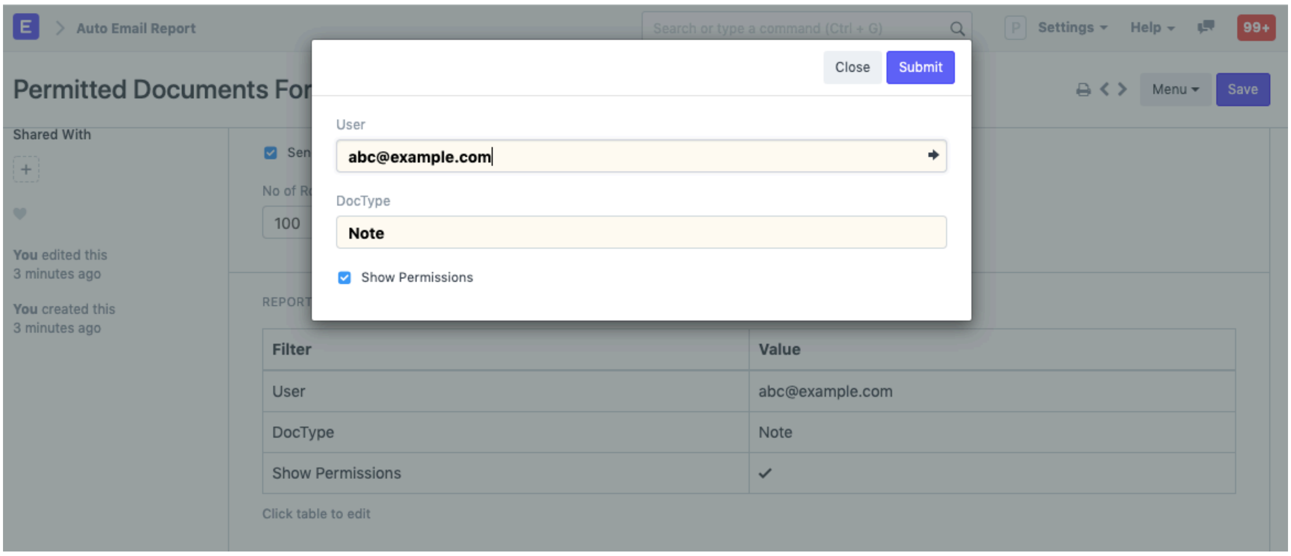
2. Features

2.1 Filter Data

- **Send only if there is any data**: If enabled, emails will not be sent if there is no data in the report.
- **Only Send Records Updated in Last X Hours**: If set to 24, an email will contain only records updated in the last 24 hours.
- **No of Rows**: The number of rows to be sent in the email. The maximum is 500.

2.2 Report Filters

If your report has filters, you will be able to see them. Click on the table to edit it:



For example, if the email is on the report 'Project Billing Summary' select the Project. The date range here is the date range of the 'Project Billing Summary'.

2.3 Message

A message can also be added to be sent with the email report. For example, 'This is your monthly Project Billing Summary Report:'

You can also change the file format in which the report is created. The available options are HTML, XLSX, and CSV.

➢ SMS Settings

You can subscribe to an SMS provider to send SMS to mobile numbers.

To integrate SMS in ERP, approach an SMS Gateway Provider who provides HTTP API. They will create an account for you and will provide a unique username and password.

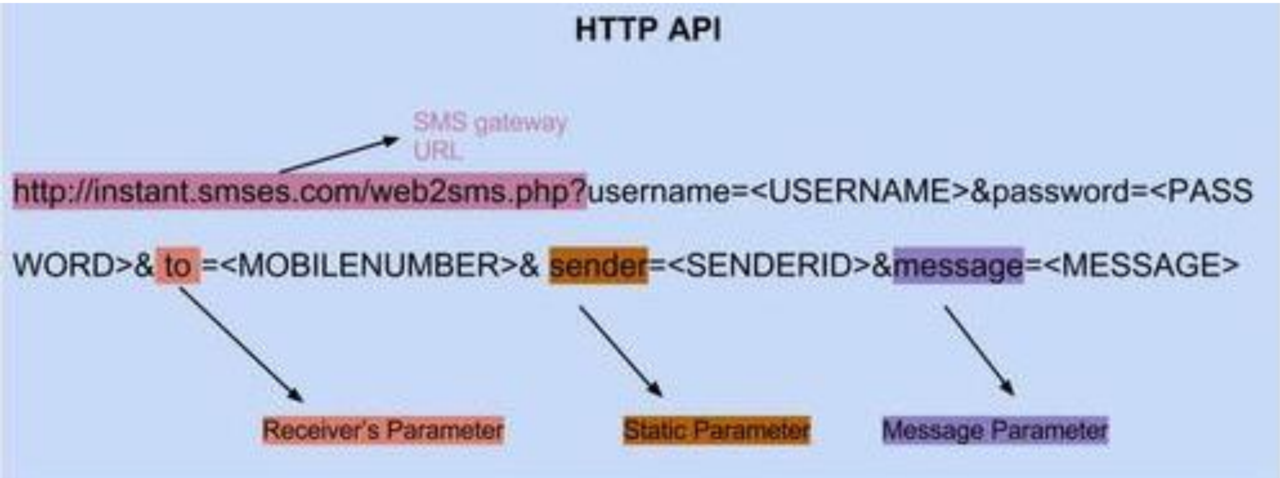
To access SMS settings, go to:

Home > Settings > SMS Settings

To configure SMS Settings in ERP, find out their HTTP API (a document which describes the method of accessing their SMS interface from 3rd party applications). In this document, you will get a URL which is used to send the SMS using HTTP request. Using this URL, you can configure SMS Settings in ERP.

Example SMS Gateway URL:

http://instant.smses.com/web2sms.php?username=<username>&password;=<password>&to;=<mobilenumber>&sender;=<senderid>&message;=<message>



Note: For SMS Gateway URL, only include the string before the "?".

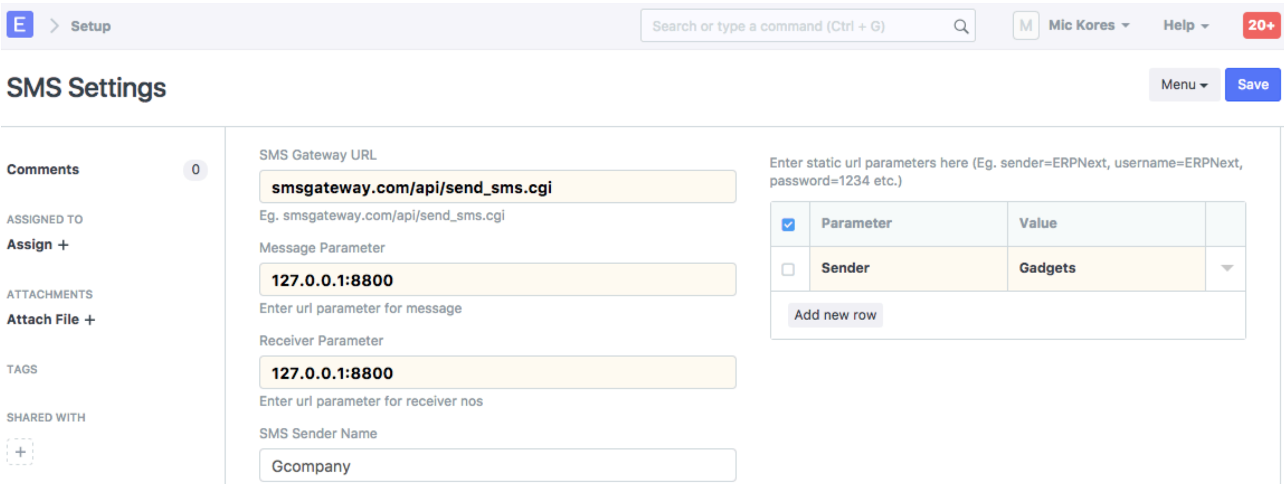
Example:

http://instant.smses.com/web2sms.php?username=abcd&password;=abcd&to;=9900XXXXXX&sender;

=DEMO&message;=THIS+IS+A+TEST+SMS

The above URL will send SMS from account abcd to mobile number 9900XXXXXX with sender ID as DEMO with a text message as "THIS IS A TEST SMS".

Note that some parameters in the URL are static. You will get static values from your SMS Provider like username, password, etc. These static values should be entered in the Static Parameters table.



How to configure ERP with Voip.ms

The first step is to login to voip.ms account. Then go **Main menu**, **SOAP and REST/JSON API**. Enable the API, set a password and whitelist your server ip address.

Then go to DIDs and enable SMS on the number SMS will be sent from.

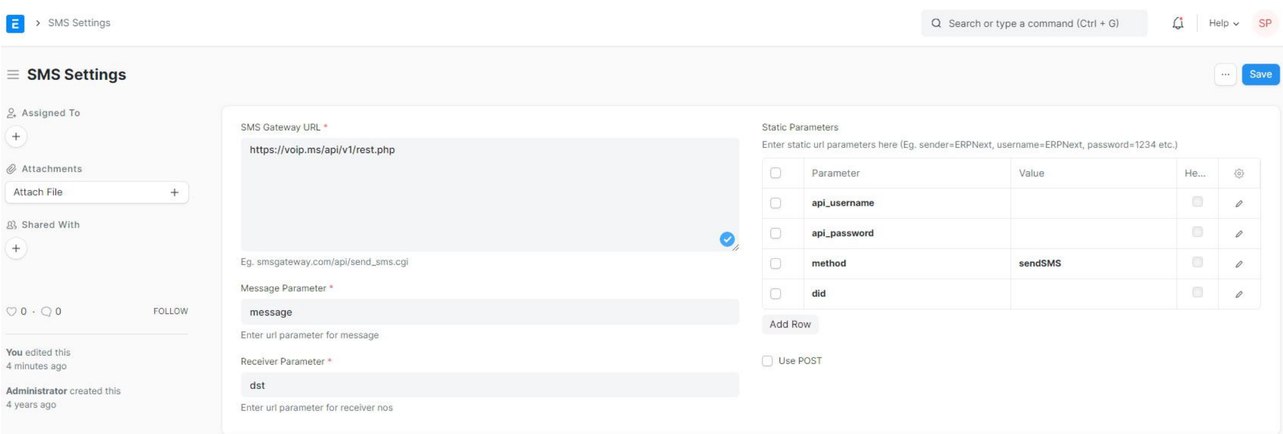
Set SMS Gateway to **https://voip.ms/api/v1/rest.php**

Set Message Parameter to **message**

Receiver Parameter to **dst**

Create 4 new Static Parameters:

- **api_username** (voip.ms account username
- **api_password** (the API password configured few minutes ago)
- **method** set value to **sendSMS**
- **did** (the 10 digits DID that will be used to send the sms)



Then go to SMS Center to test if everything works properly.

➢ Notification

You can configure various notifications in your system to remind you of important activities.

1. The completion date of a Task.
2. Expected Delivery Date of a Sales Order.
3. Expected Payment Date.
4. A reminder of follow up.
5. If an Order greater than a particular value is received or sent.
6. Expiry notification for a Contract.
7. Completion/Status change of a Task.

To access notification setup, go to:

Home > Settings > Notification

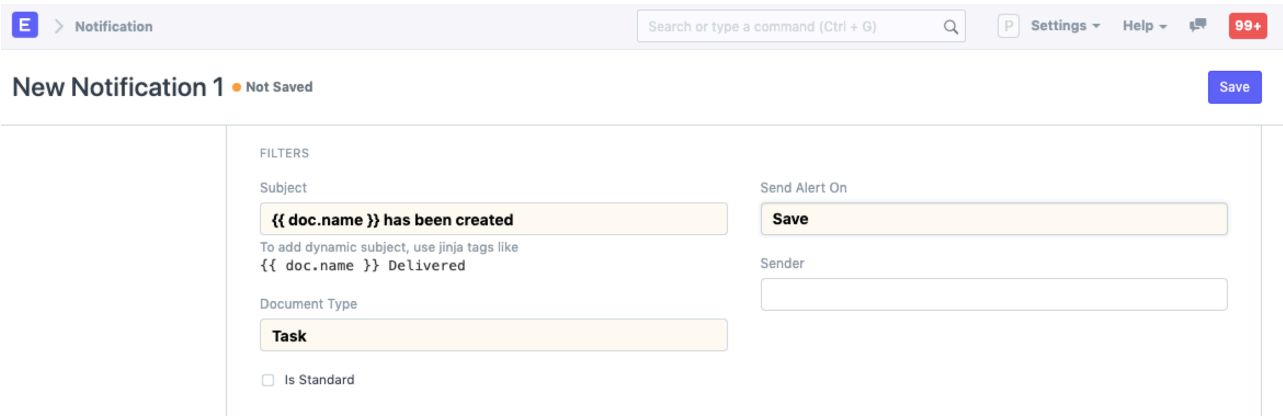
1. Setting Up An Alert

To set up a Notification:

1. Select the Document Type you want to watch changes on.
2. Define what events you want to watch under Send Alert On. Events are:
    1. New: When a new document of the selected type is made.
    2. Save/Submit/Cancel: When a document of the selected type is saved, submitted, or canceled.
    3. Days Before/Days After: Trigger this alert a few days before or after the **Reference Date.** To set the days, set **Days Before or After**. This can be useful in reminding you of upcoming due dates or reminding you to follow up on certain leads of quotations.
    4. Value Change: When a particular value in the selected type changes.
    5. Method: Sends notification when a specific method is triggered. Eg: before_insert.
    6. Custom: Send a notification to an Email Account selected.
3. Set additional Conditions if required.
4. Set the recipients of this alert. The recipient could either be a field of the document or a list of fixed Email Addresses.
5. Compose the message.
6. Save.

1.1 Setting a Subject

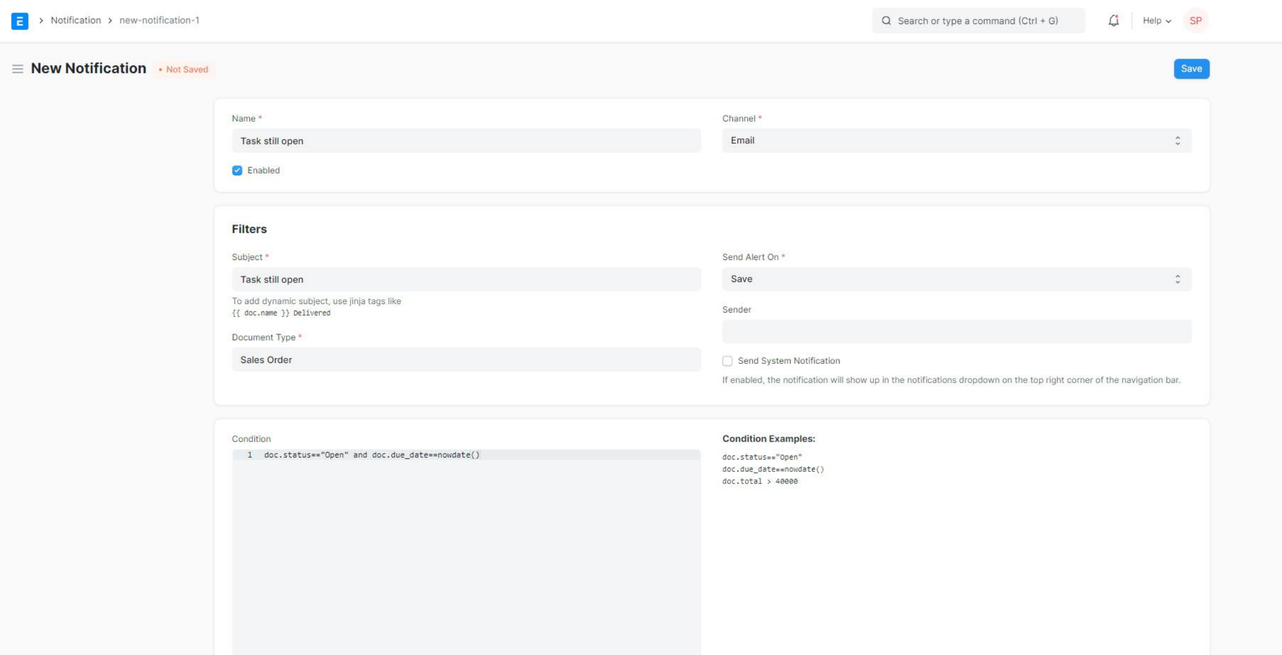
You can retrieve the data for a particular field by using doc.[field_name]. To use it in your subject/message, you have to surround it with {% raw %}{{ }}{% endraw %}. These are called Jinja tags. For example, to get the name of a document, you use {% raw %}{{ doc.name }}{% endraw %}. The following example sends an email on saving a Task with the Subject, "TASK#### has been created"



1.2 Setting Conditions

Notifications allow you to set conditions according to the field data in your documents. For example, if you want to receive an Email if a Lead has been saved as "Interested" as it's status, you put doc.status == "Interested" in the conditions textbox. You can also set more complex

conditions by combining them with the operator **and** or **or**.



The above example will send a Notification when a Task is saved with the status "Open" and the "Expected End Date" for the Task is the date on or before the date on which it was saved on.

1.3 Setting a Message

You can use both Jinja Tags ({% raw %}{{ doc.[field_name] }}{% endraw %}) and HTML tags in the message textbox.

{% raw %}<h3>Order Overdue</h3>

<p>Transaction {{ doc.name }} has exceeded Due Date. Please take necessary action.</p>

<!-- show last comment -->

{% if comments %}

Last comment: {{ comments[-1].comment }} by {{ comments[-1].by }}

{% endif %}

<h4>Details</h4>

Customer: {{ doc.customer }}

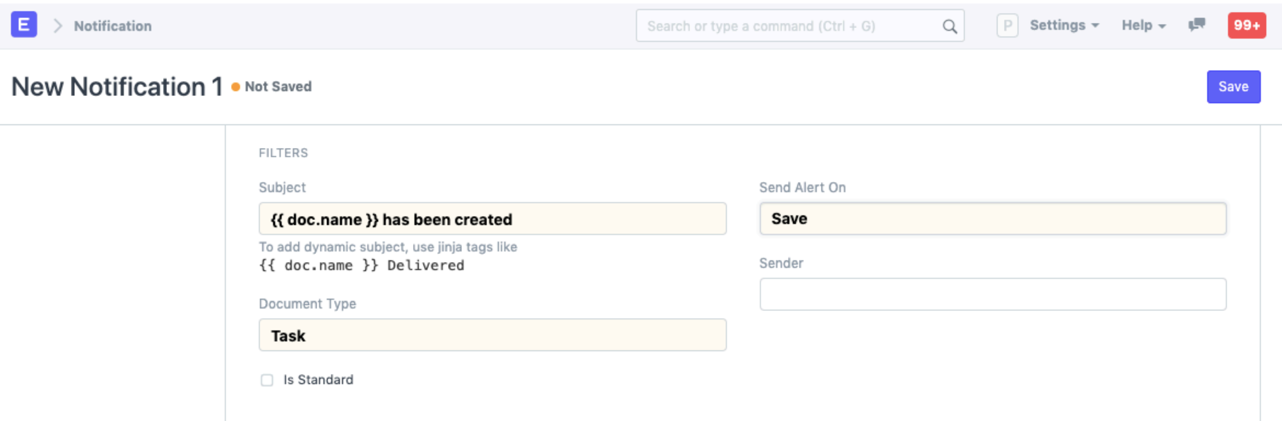
Amount: {{ doc.total_amount }}

{% endraw %}

1.4 Setting a Value after the Alert is Set

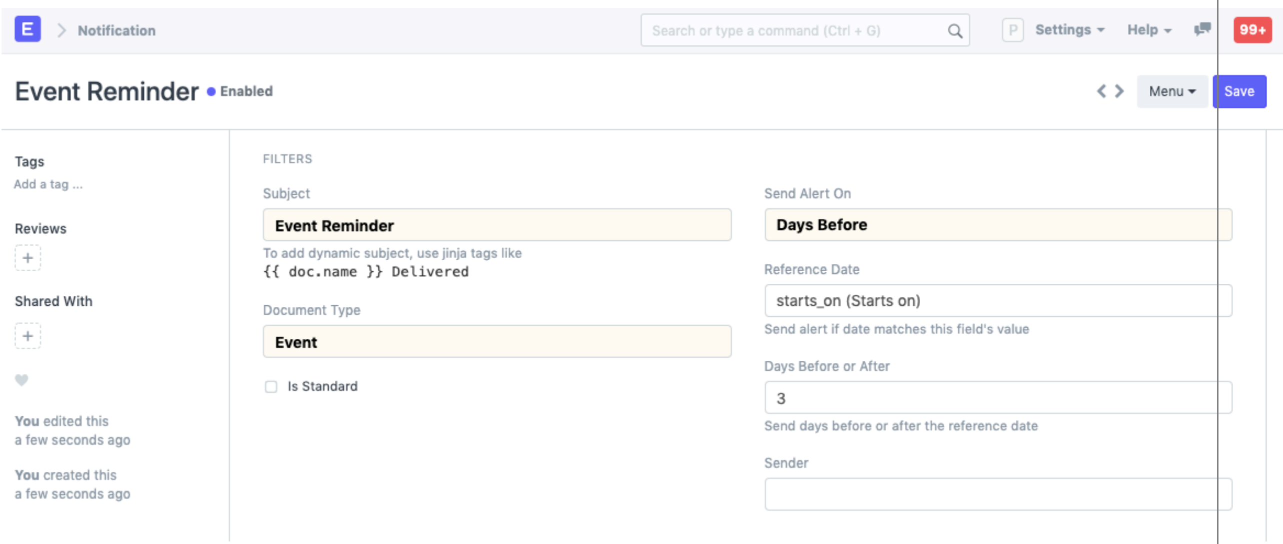
Sometimes to make sure that the Notification is not sent multiple times, you can define a custom property (via Customize Form) like "Notification Sent" and then set this property after the alert is sent by setting the **Set Property After Alert** field.

Then you can use that as a condition in the **Condition** rules to ensure emails are not sent multiple times

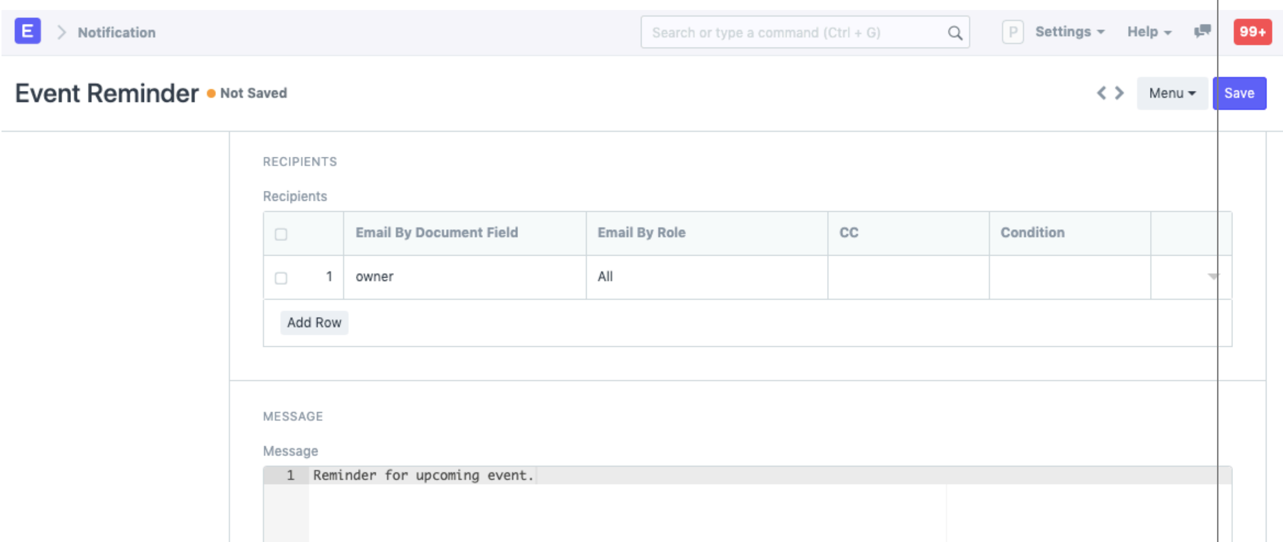


1.5 Example

1. Defining the Criteria



2. Setting the Recipients and Message



3.

---

2. Slack Notifications

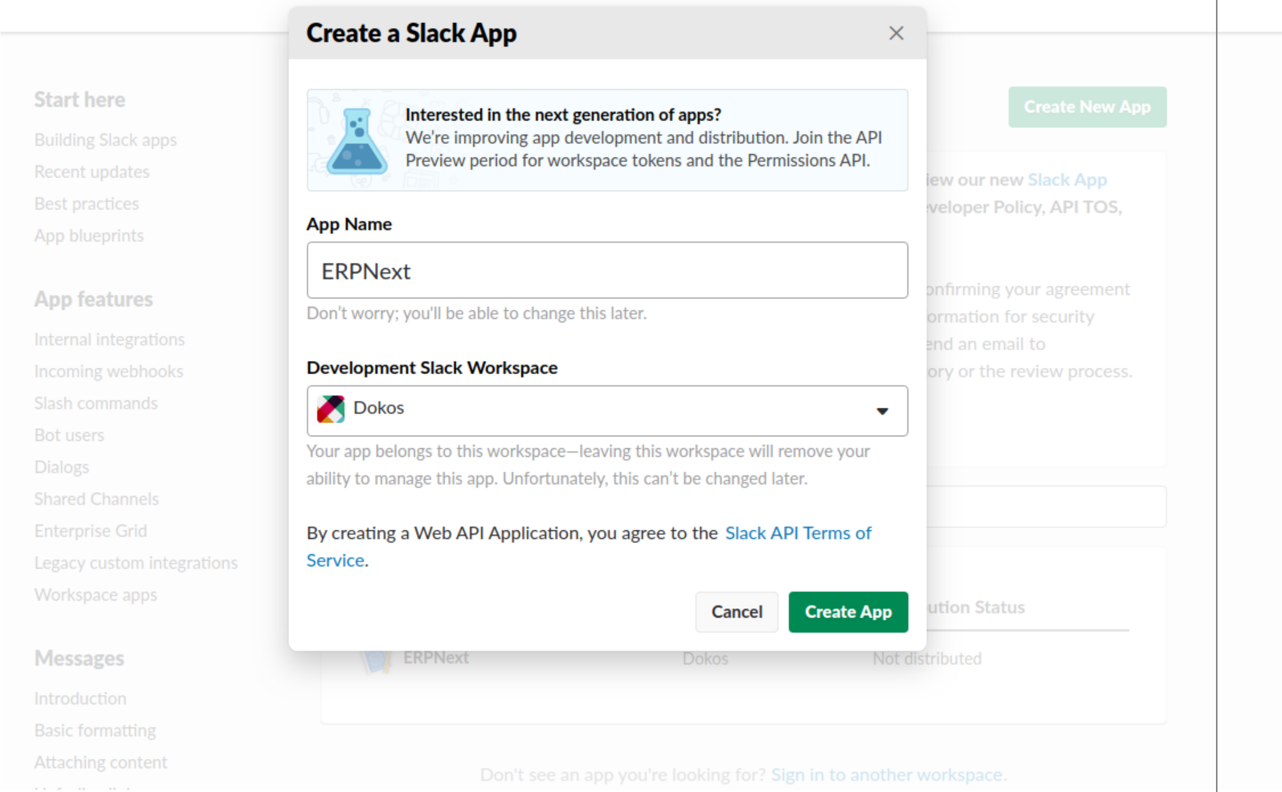
If you prefer to have your notifications sent to a dedicated Slack channel, you can also choose the option "Slack" in the channel options and select the appropriate Slack Webhook URL.

2.1 Slack Webhook URL

A Slack webhook URL is a URL pointing directly to a Slack channel.

To generate webhook URLs, you need to create a new Slack App:

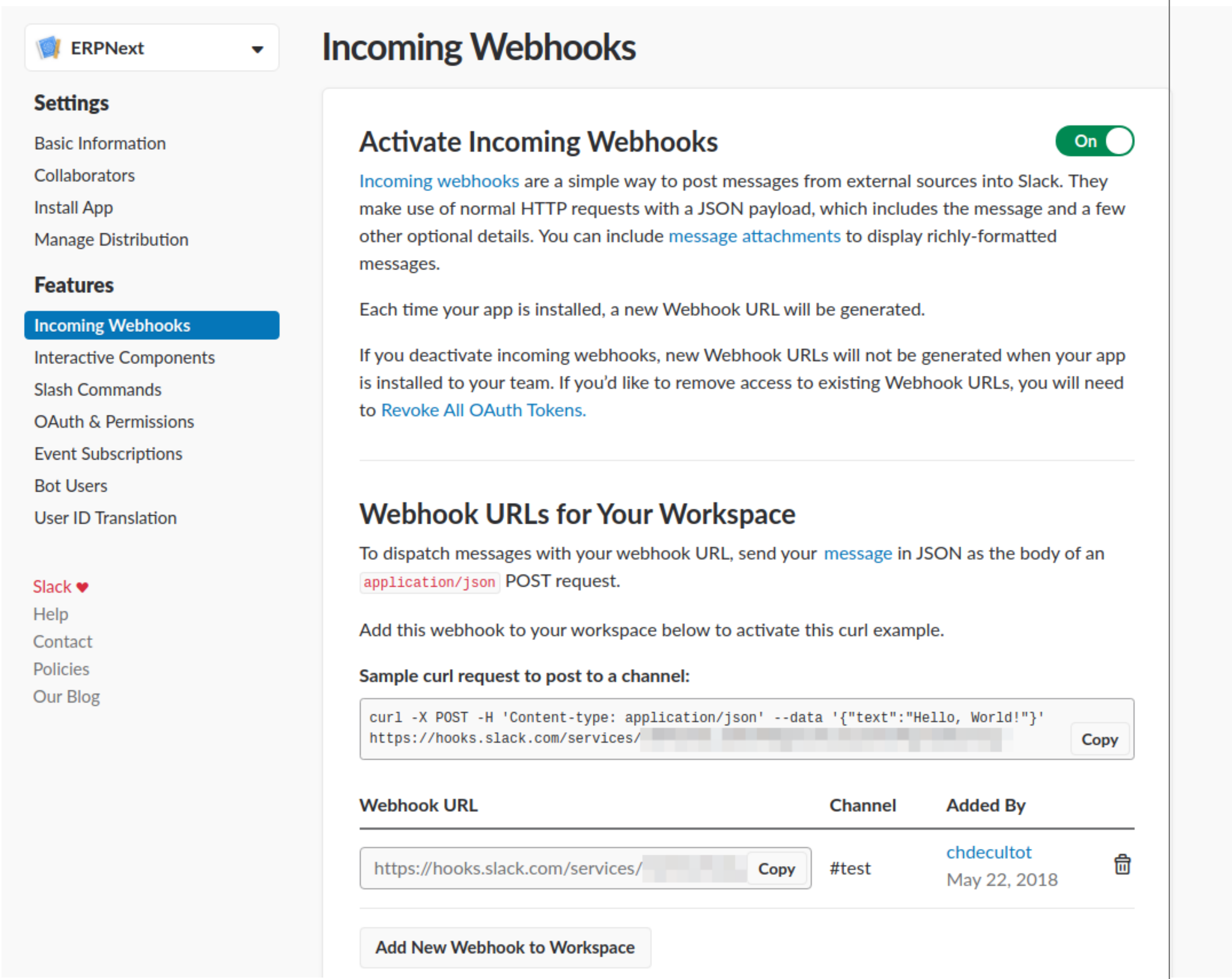
1. Go to https://api.slack.com/slack-apps.
2. Click on "Create a Slack App".



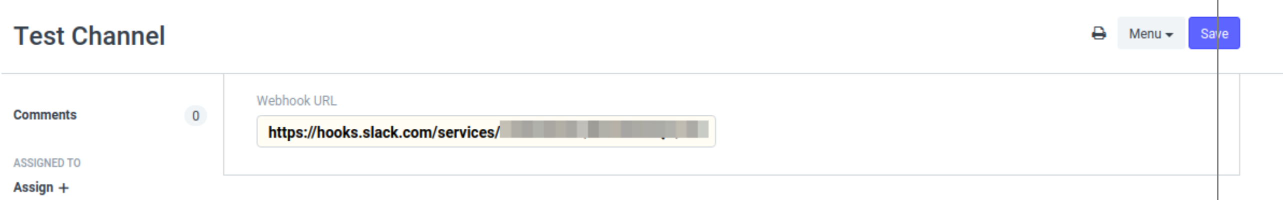
3.

4. Give your App a name and choose the right workspace. Once your app is created, go to the "Incoming Webhooks" section and add a new Webhook to Workspace.

5.



6. Copy the created link, go back to ERP and use it to create a new Slack Webhook URL in Integrations > Slack Webhook URL.



7. Select Slack and your Slack channel in the channel and Slack channel fields within your notification

2.2 Message Format

Unlike Email messages, Slack doesn't allow HTML formatting.

Instead, you can use markdown formatting: [Slack Documentation]

Example: {% raw %} *Order Overdue*

Transaction {{ doc.name }} has exceeded Due Date. Please take the necessary action.

{% if comments %}

Last comment: {{ comments[-1].comment }} by {{ comments[-1].by }}

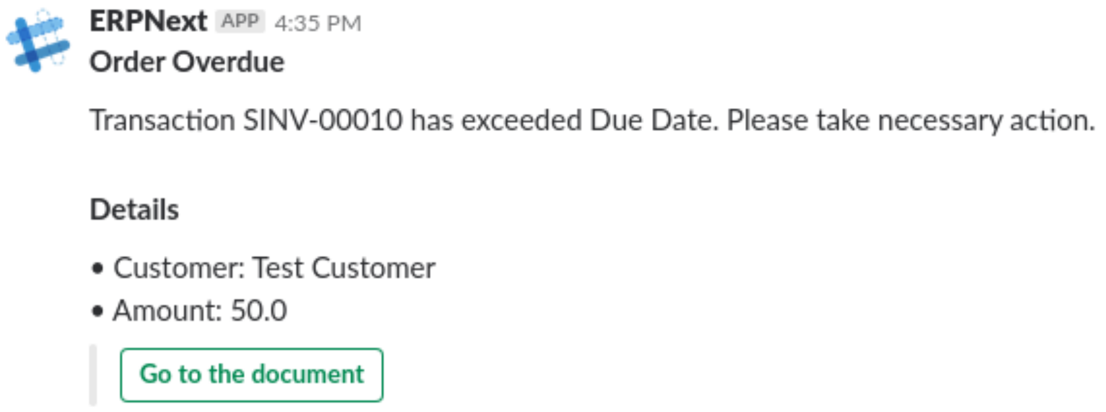
{% endif %}

Details

• Customer: {{ doc.customer }}

• Amount: {{ doc.grand_total }}

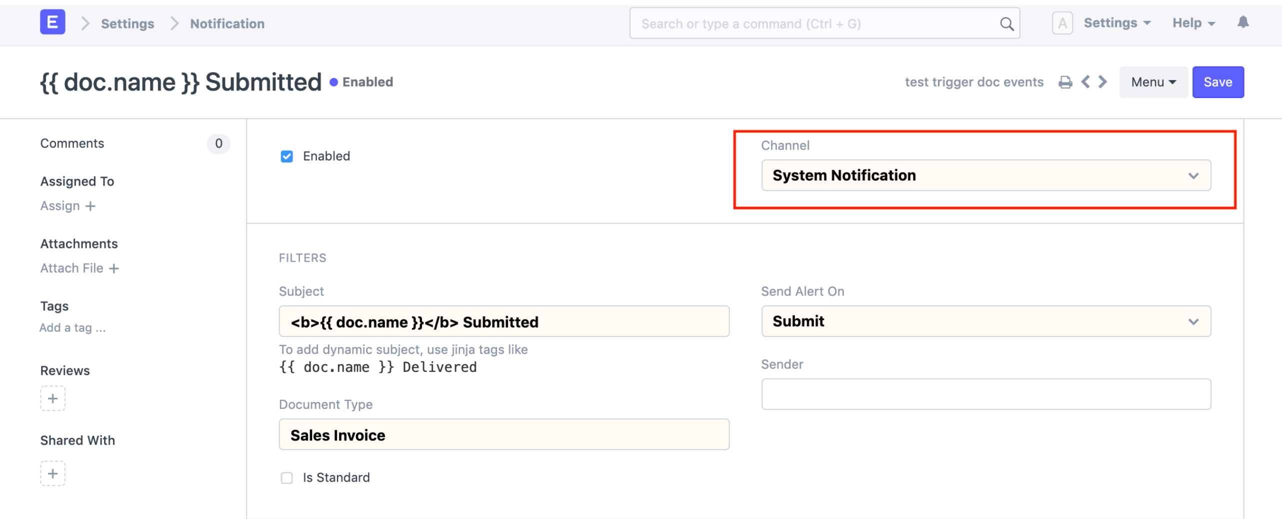
{% endraw %}



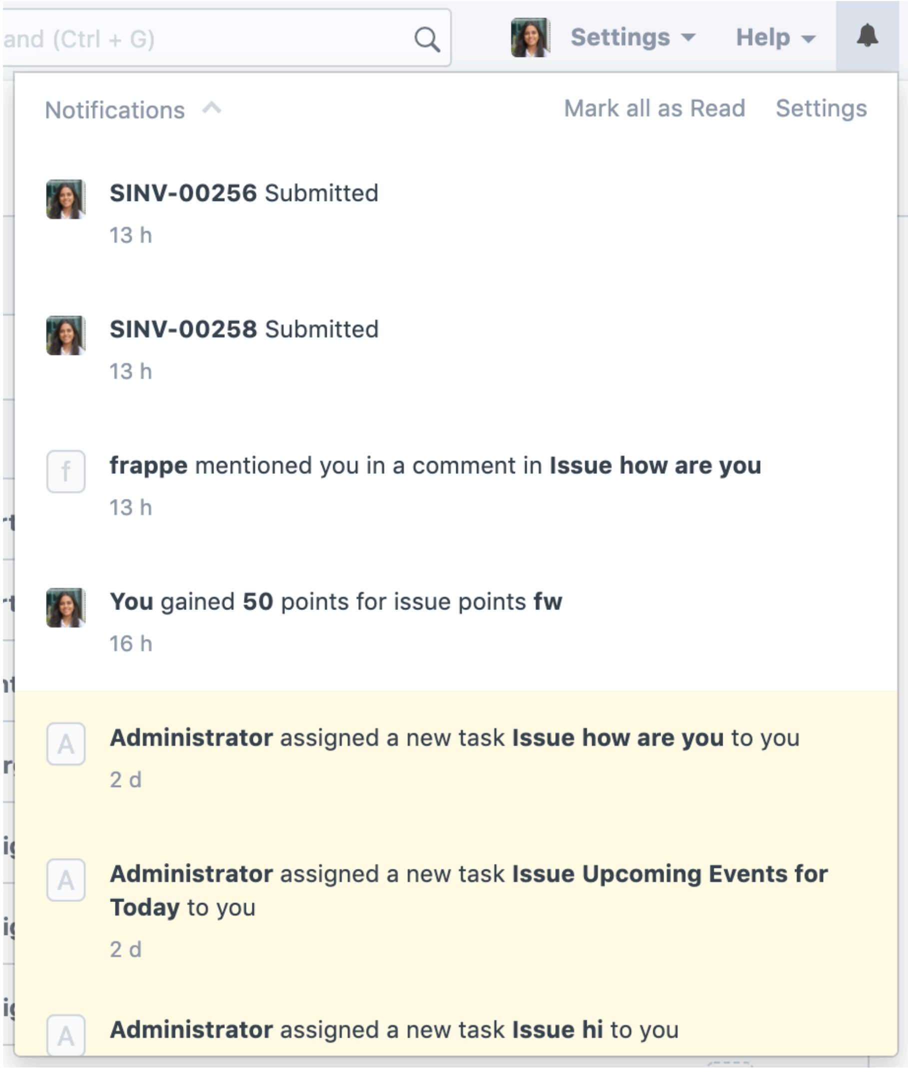
3. System Notifications

In **Version 12** we introduced System notifications for **Assignments**, **mentions**, **documents shared**, and **Energy Points**. These notifications show up in the notifications dropdown on the the navigation bar's top right corner.

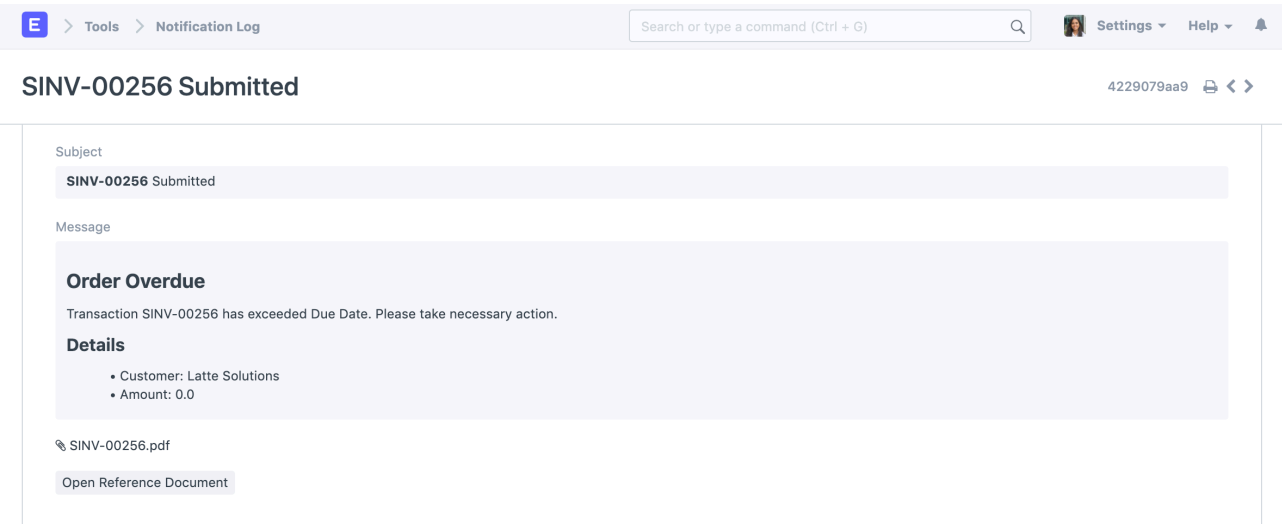
In **Version 13** we have introduced an additional channel to send alerts - **System Notifications**:



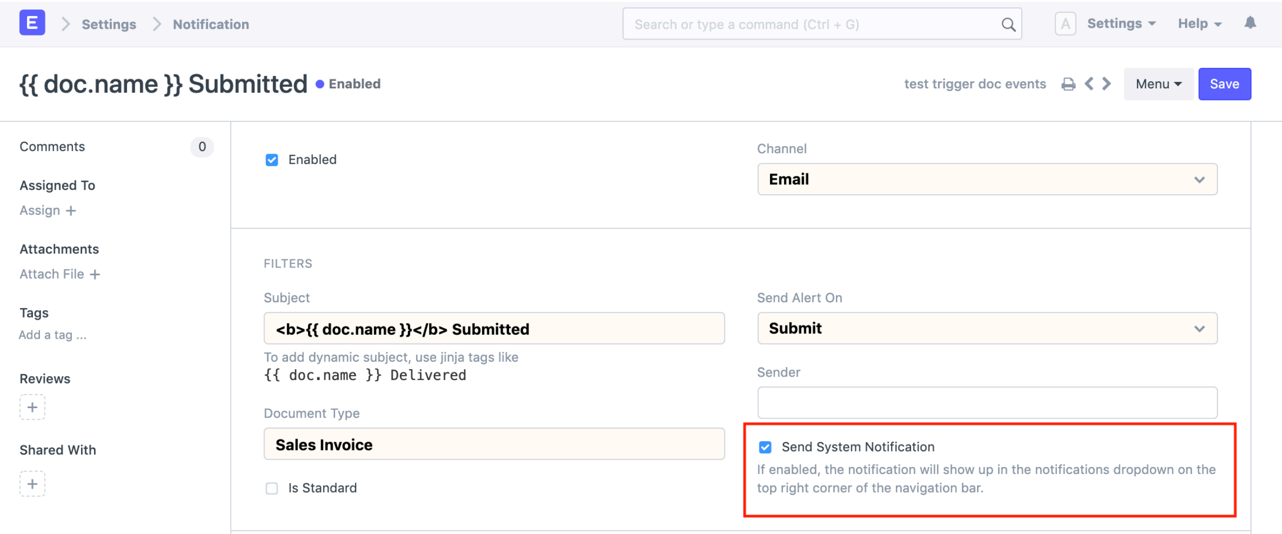
Choosing this channel will send a system notification when a notification is triggered, instead of an Email or a Slack notification.



Clicking on the notification routes to the **Notification Log** document which contains the configured subject, message as well as the attached file, if Attach Print is set:

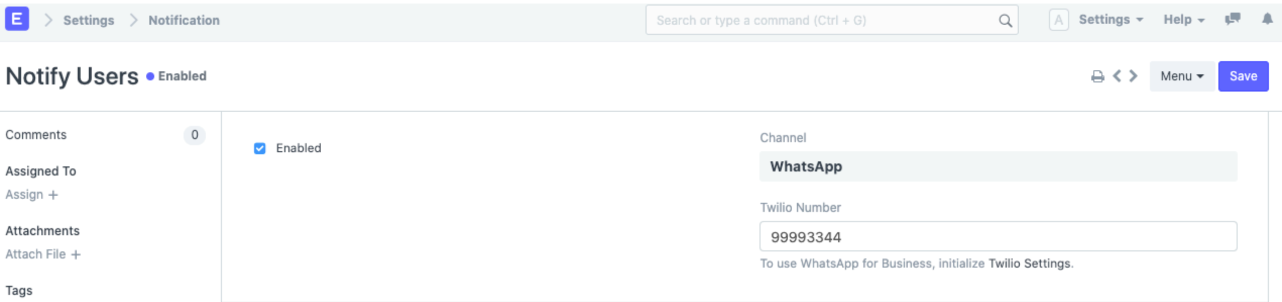


If Email/Slack alerts and System Notifications both are required, the main channel can be set as Email or Slack and this option can be checked:

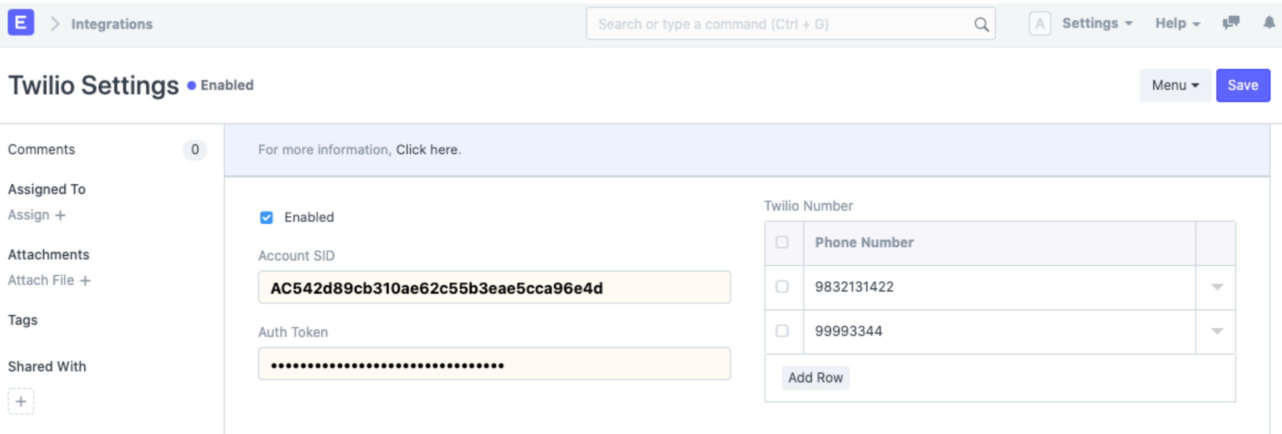


4. WhatsApp

In **Version 13** we have introduced an additional channel to send alerts - **WhatsApp**:

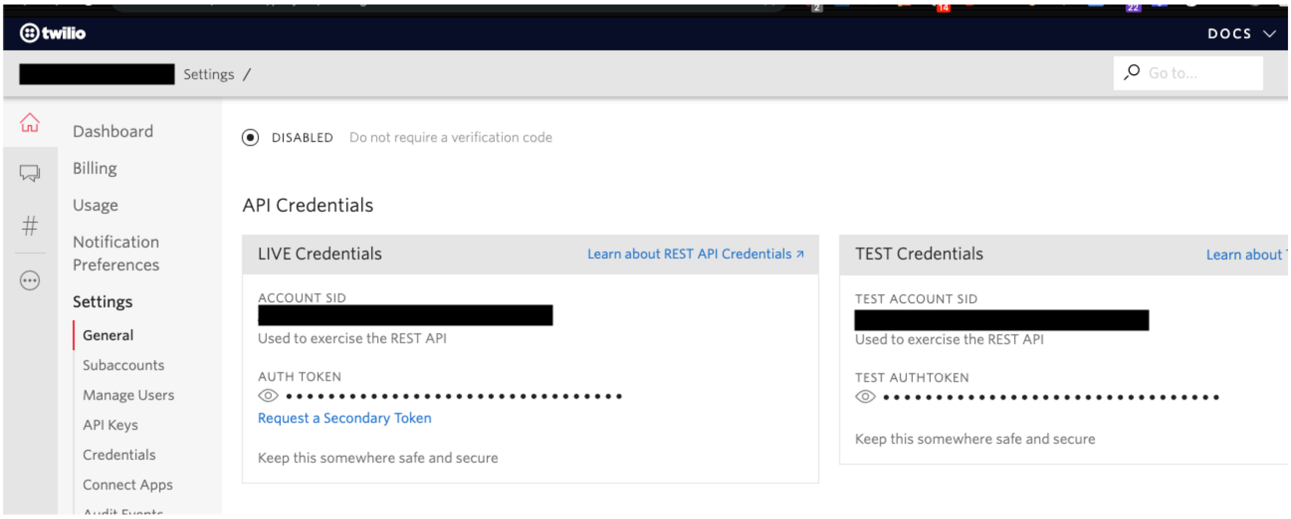


If you prefer to have your notifications sent to a WhatsApp number, you can also choose the option "WhatsApp" in the channel options and select the appropriate Twilio Number. Twilio Numbers can be added to Twilio settings in Frappe. WhatsApp messages can only be sent to numbers which have country codes in them.



4.1 Twilio Settings

In order to configure Twilio settings, you need to first obtain Twilio credentials from your Twilio Account's account settings. You can only add those phone numbers that have been activated in your Twilio Account with WhatsApp access.



4.2 Message Format

WhatsApp allows their users to only send those message templates that are pre-approved by them to your customers. Failure to do so might result in restrictions on you Twilio account.

Warning: Only Use Pre-Approved WhatsApp for Business Template

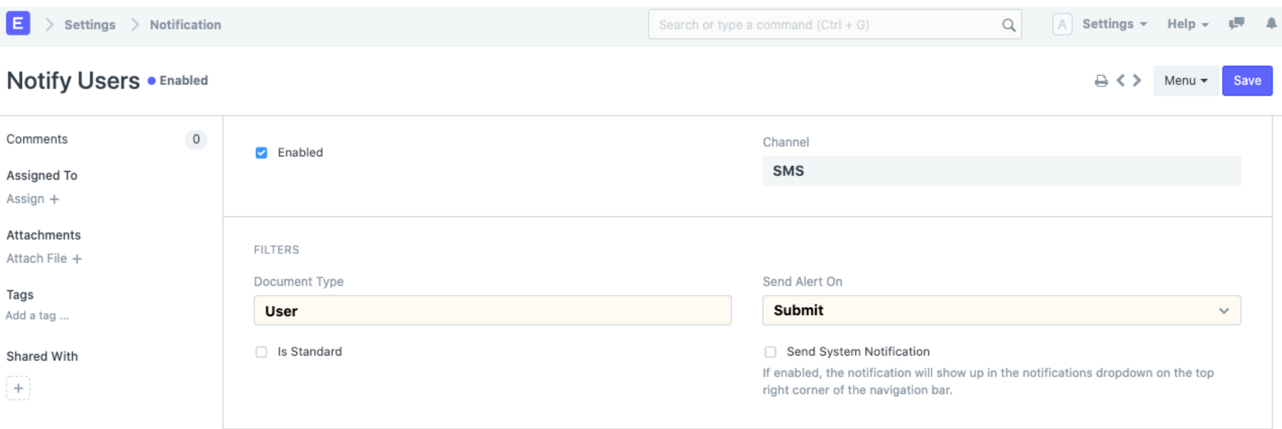
Message Example

```
Your appointment is coming up on {{ doc.date }} at {{ doc.time }}
```

View Properties (via Customize Form)

5. SMS

We have introduced an additional channel to send alerts - **SMS**:



In order to use this channel, you would need to complete the configuration of SMS Settings.

➢ Document Follow

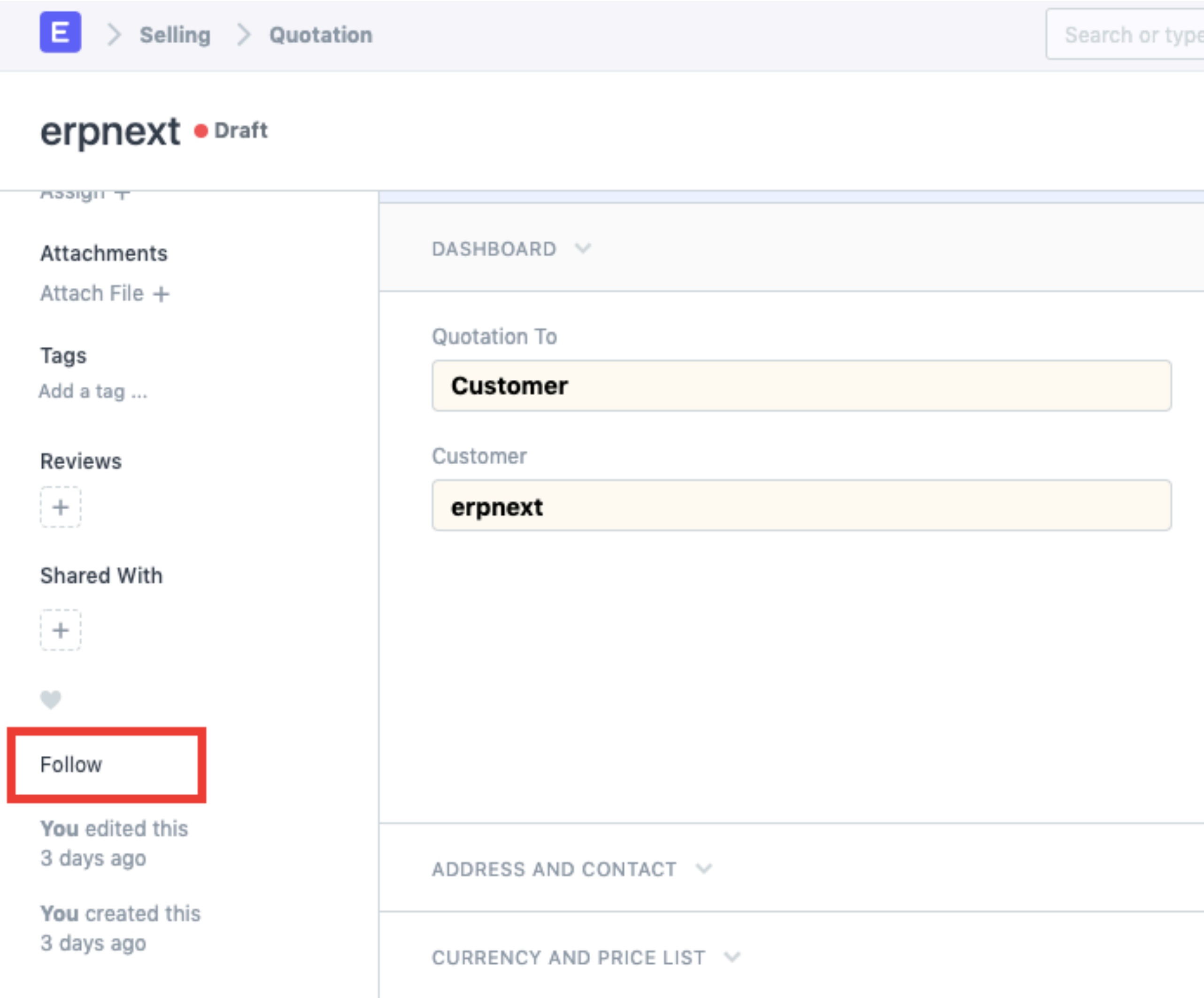
Document Follow is a feature that allows users to track changes in documents via email notifications.

1. How to Activate Document Follow

1. Go to: **Settings > My Settings**.
2. In the Document Follow section, tick the 'Send Notifications for documents followed by me' checkbox.
3. Set the frequency at which you want to receive emails.
4. Now, you can receive emails for the documents you follow.

1.1 How to Follow documents

1. Go to any document, you'll see an option to follow the document.
2. Click on 'Follow'.



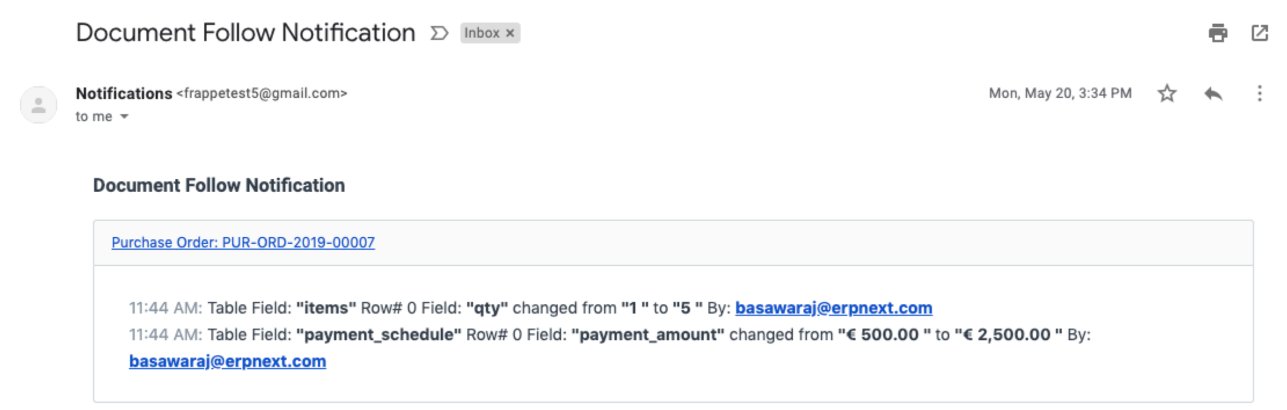
1. After following, you can also unfollow a document.
2. Note that you can only follow documents for which track changes are on.
3. To enable track changes, go to **Menu** > **Customize** > ***tick the Track Changes checkbox***.

1.2 Automatic Follow

Cases where the document will be **automatically** followed after activating Document Follow:

- When you create a new document.
- When you modify a document.
- When you like a document using the heart icon.
- When another user shares a document with you or assigns you to a document, you'll be following the document.

This is what an email notification for Document Follow will look like:



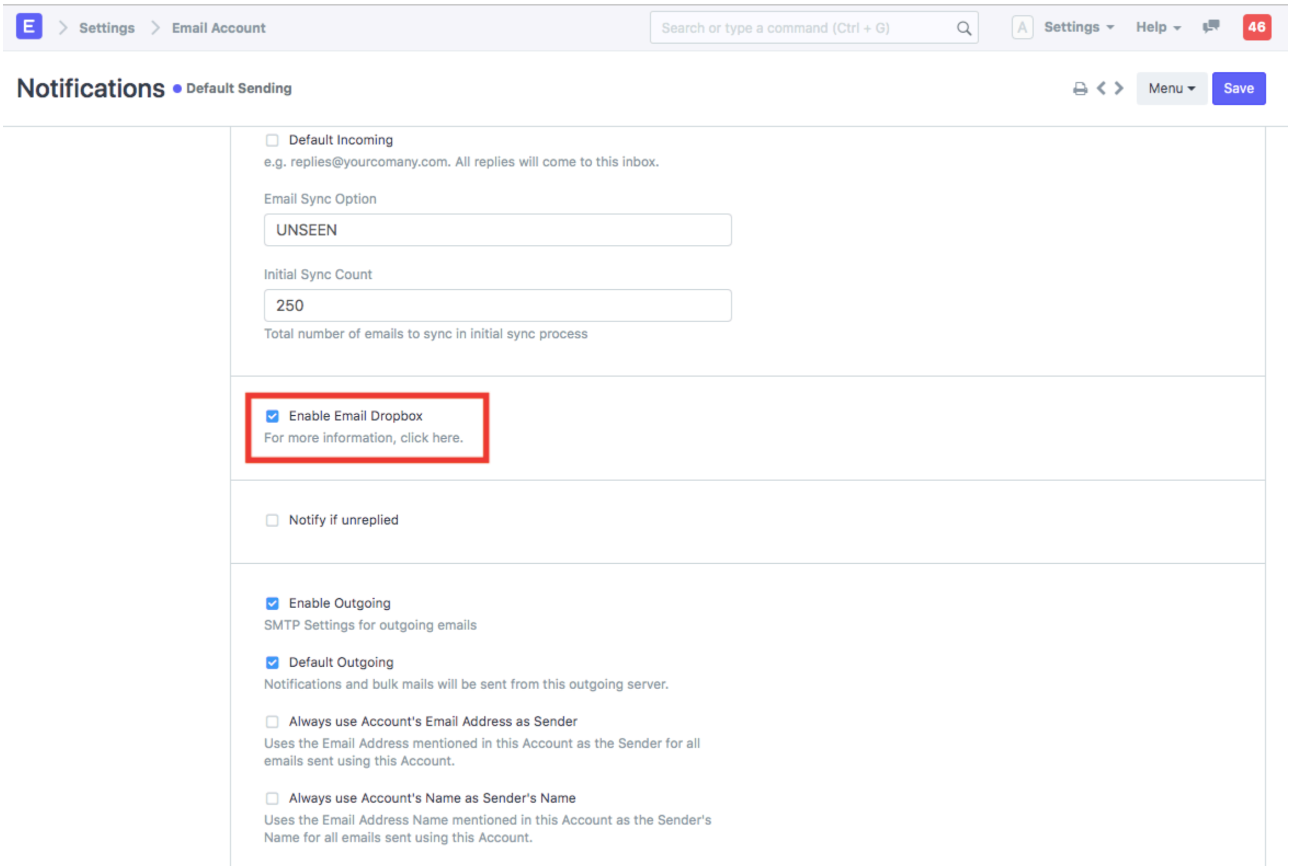
➢ Email Dropbox

When you receive emails from Leads, Customers, Suppliers, or other business partners, you might wish to attach those to their relevant records in ERP. One way to do so is to save the email and upload it as an attachment. However, this could turn into a cumbersome process. ERP offers a better way to handle this through its "Email Dropbox" feature.

When enabled, each record in ERP will have it's own unique email address to which you can forward emails. You can click on the email address to copy it to your clipboard, which can then be added to the "To", "Cc", or "Bcc" field of the email that you wish to send.

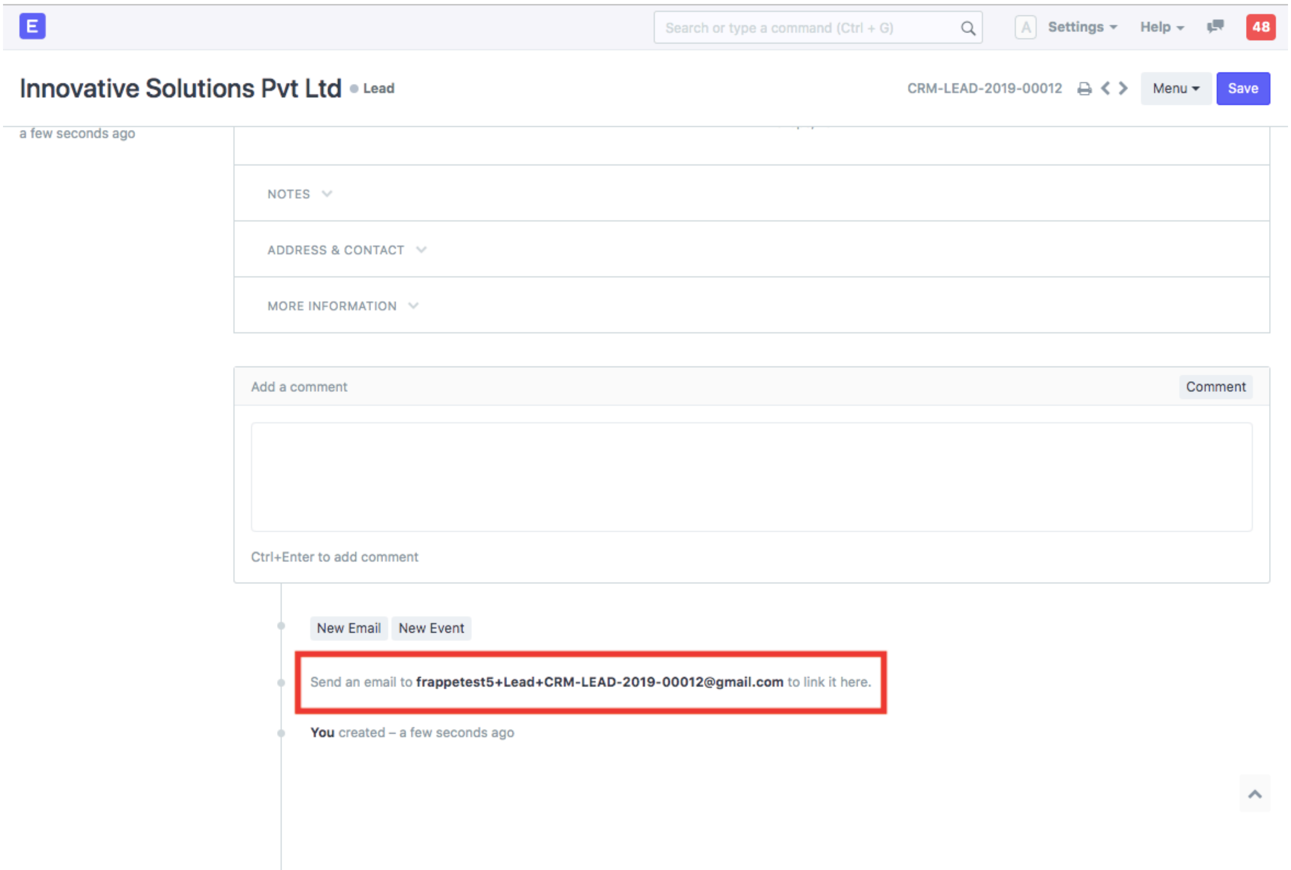
1. Enable Email Dropbox Feature

In Email Account, check 'Enable Email Dropbox'.



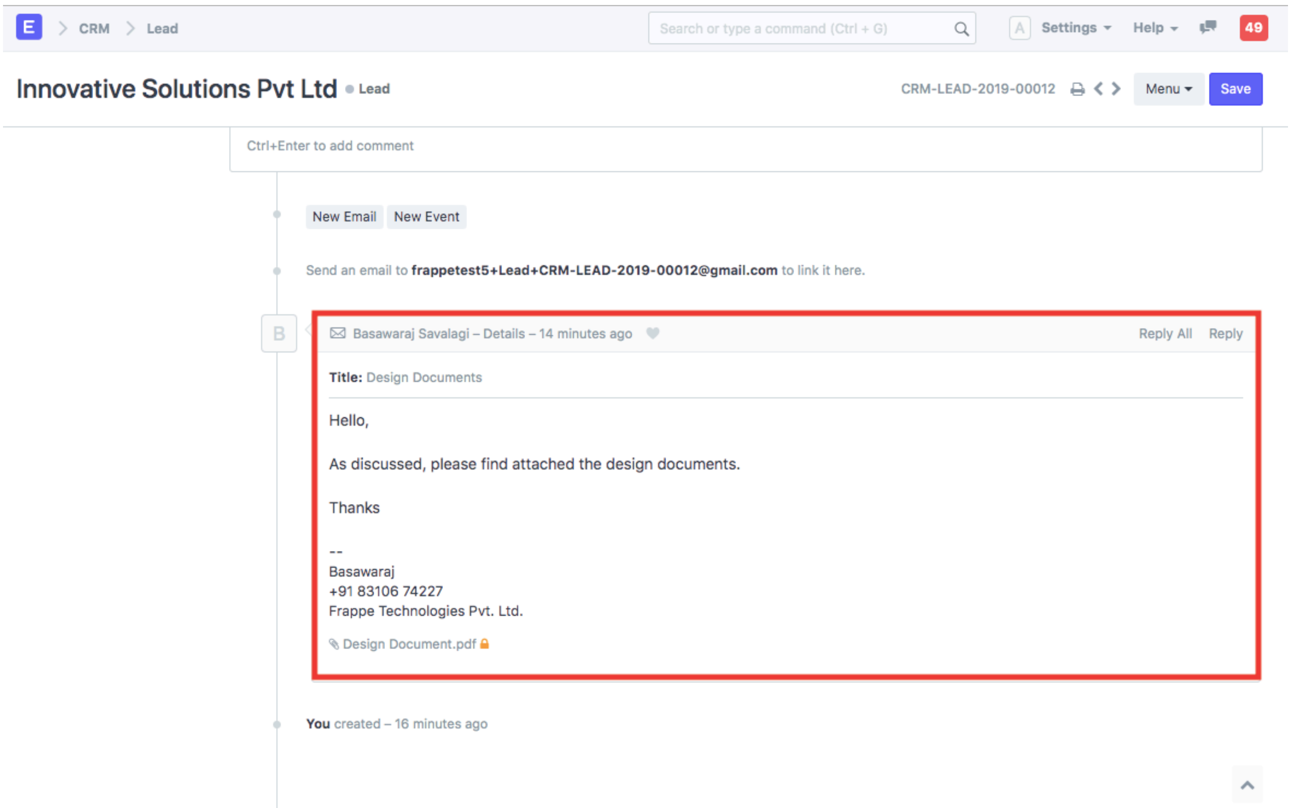
2. Copy Unique Email Address in Any Record

Once the Email Dropbox feature is enabled, the unique email address becomes visible in all the records. You can click on the same and the address is copied to your clipboard. You can directly paste it in 'To', 'Cc' or 'Bcc' and send the email.



3. Email in Timeline

Once the email is received, ERP attaches it to the appropriate record and it will be visible in that record's timeline.



SYSTEM CONFIGURATION

Settings

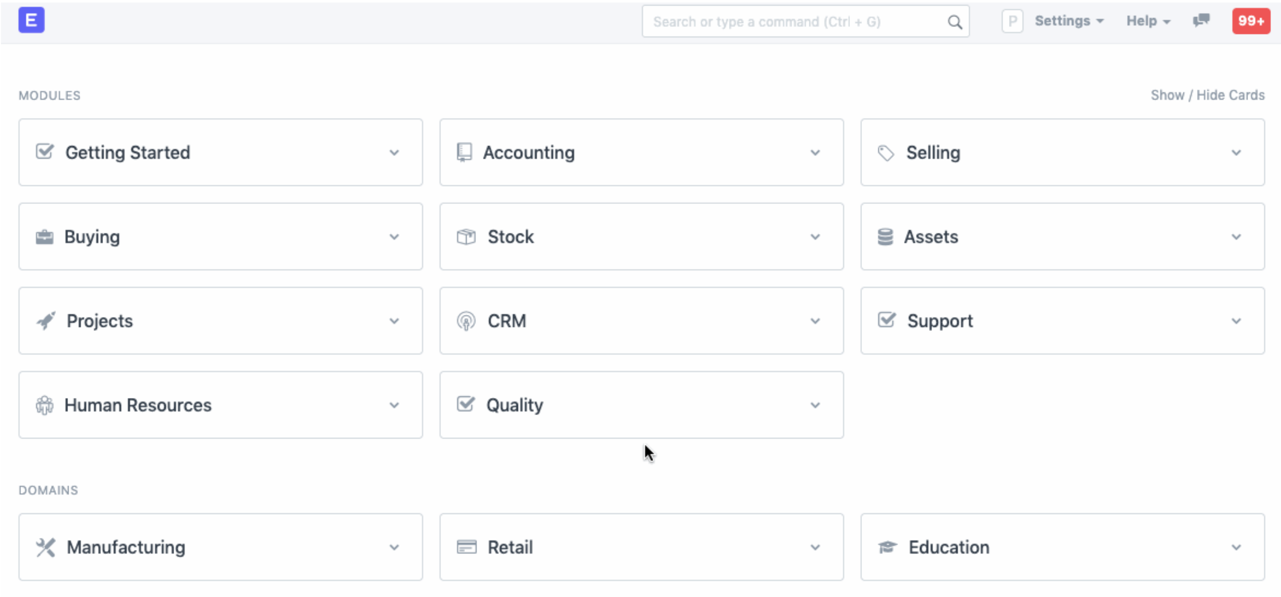
In Setup > Settings you will find ways to manage your system settings like defaults, number and currency formats, global session timeout settings etc.

Show or Hide Modules

You can globally Hide or Unhide certain modules by clicking on Show/Hide Cards in your ERP Home Page.

For example, if you are in the services business, you want to hide the Manufacturing Module, you can do this using this tool.

Check/uncheck the items to show or hide modules.



Document Naming Settings

Masters and transactions can be given prefixes in the form of naming series.

ERP allows you to make prefixes to your documents, with each prefix forming its own series. For example, a series with prefix INV12#### will have numbers INV120001, INV120002, and so on.

You can have multiple series for all your transactions. For example, Sales Invoice IDs like these can be generated:

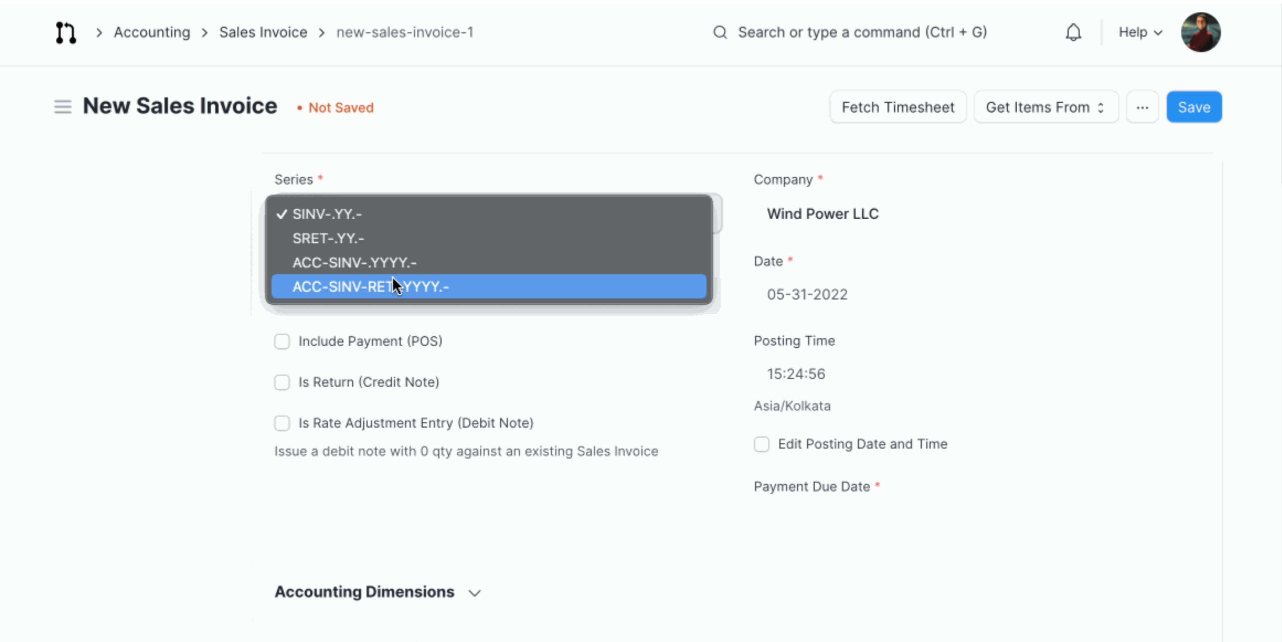
- ACC-SINV-.YYYY.-
- SINV12####
- SALESINV-00####

You can define or select the Naming Series pattern from:

Home > Settings > Document Naming Settings

1. Setting up Naming Series for Documents

1. Select the transaction for which you want to make the series. The system will update the current series in the text box.
2. Edit the series as required with unique prefixes for each series. The first prefix will be the default prefix. Each new prefix Naming Series must be added on a new line. The newly added naming series will be available in the document.



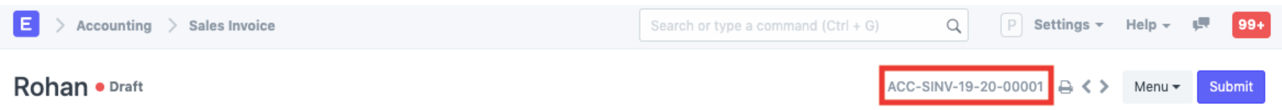
3. If you want the user to explicitly select a series instead of the default one, check the "User must always select" checkbox. There will be no default naming series if this is ticked.
4. You can also update the starting point of a series by entering the series name and the starting point in the "Update Series" section.
5. Click on the Update button to update the set of Naming Series for the selected document.

Note: To see the newly added Naming Series, click on Settings > Reload.

2. Financial Year in Naming Series

You can also show the financial year in the Naming Series. By default, if you enter 'YYYY' in the naming series, it'll pick up the current year. To set naming series based on the fiscal year, enter something like 'ACC-SINV-.19-20.-' where 19-20 is the current Fiscal Year. It is common to have a separate series for each financial year.

As you can see, in the following screenshot of a Sales Invoice, the year 2019 is listed:



3. Updating the current value for existing Naming Series

You can change the starting/current sequence number of an existing series.

1. Under the Update Series section, select the prefix whose sequence is to be changed.
2. The current value will be fetched and displayed.
3. Change starting/existing sequence number if needed.
4. Click on Update Series Number.

For example, if the current Sales Order series number is at 16, and you want to restart or set it as 50, enter 0 or 50 depending on your case. Any new Sales Order created will start from the new sequence number.

To know more about this, [visit this article](#).

Tip: You could have a separate series for each type of Customer or for each of your retail outlets.

4. Using Field Values in Naming Series

Some companies prefer to make use of "short-codes" for suppliers, i.e. WN for company "Web Notes" that later can be used in naming series for quick identification.

For example:

A custom field "Vendor ID" is created under Document: Supplier.

Then under Naming Series, we allow something like

PO-.*YY.MM.*-.*vendor_id*.-.####

Resulting in "PO-1503-WN-00001"

➢ Session Defaults

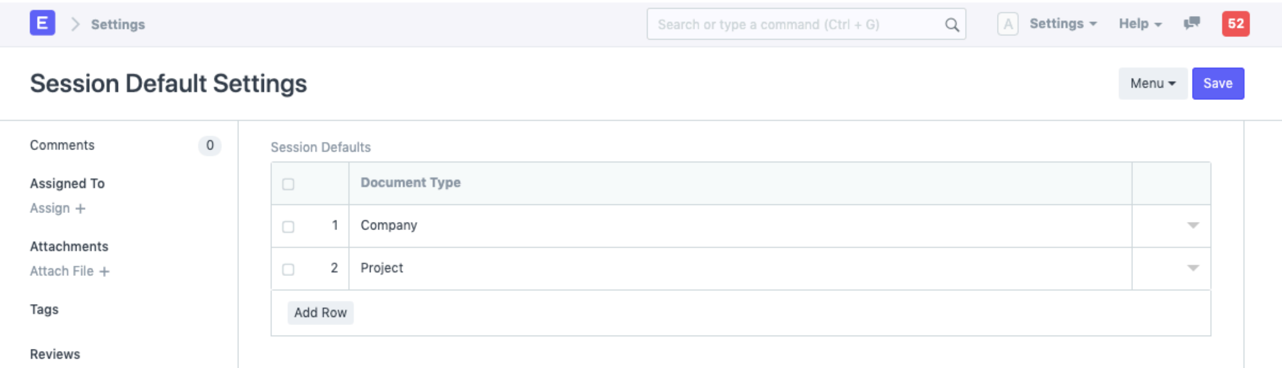
Session Defaults are configurable default values set during user sessions.

Consider a scenario where you have 8 companies set up in your account and you have to set the 'Company' field every time while creating a new Sales Order. This is a very time-consuming process when you have to deal with multiple Sales Orders daily.

1. How to Create Session Defaults

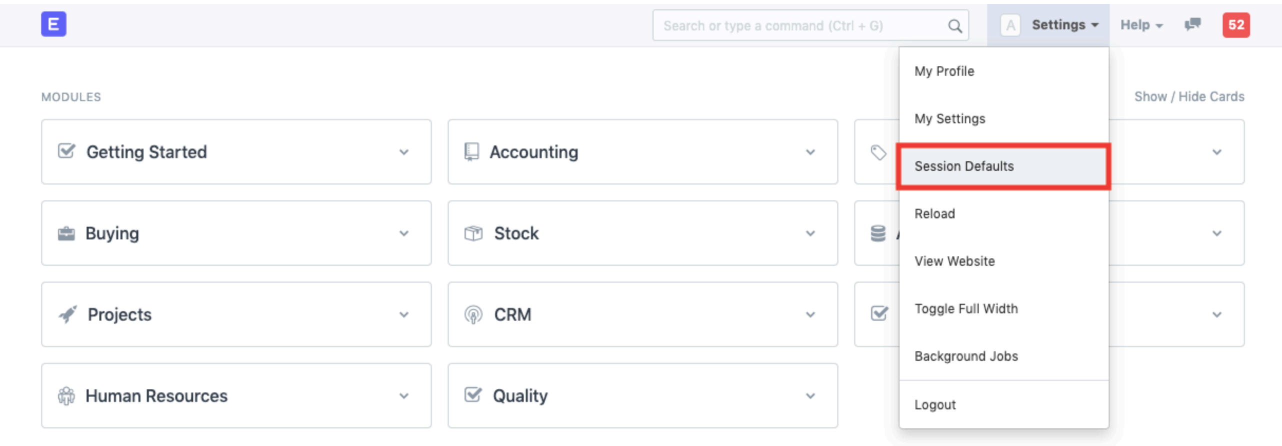
1.1 Set up the Session Default Settings

1. Go to Session Default Settings. There you can see a table for Session Defaults.
2. Click on 'Add Row'.
3. Select the DocType for which you want to set Session Defaults.
4. Save.

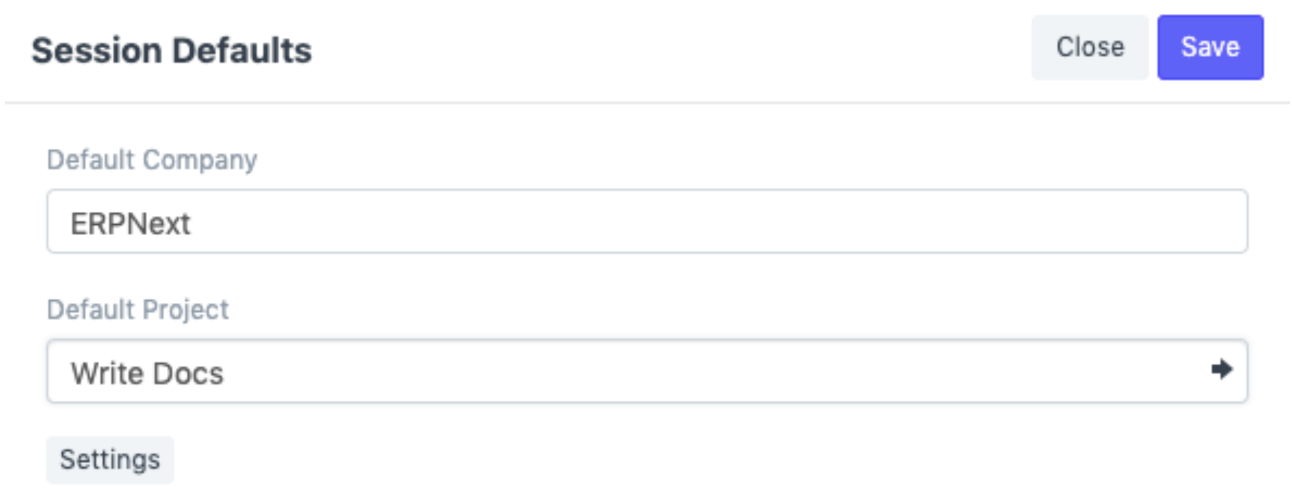


1.2 Set up the Session Default Values

1. Click on the 'Settings' menu in the toolbar. You will find an option 'Session Defaults' there. Click on it.

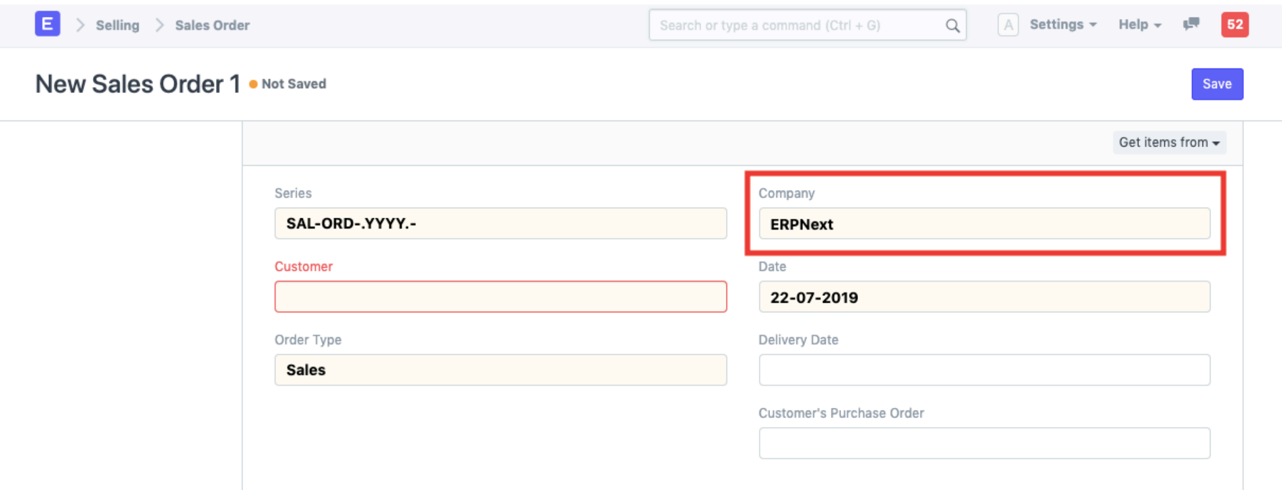


2. A 'Session Defaults' prompt will appear. Set the default values for the respective fields and Save.

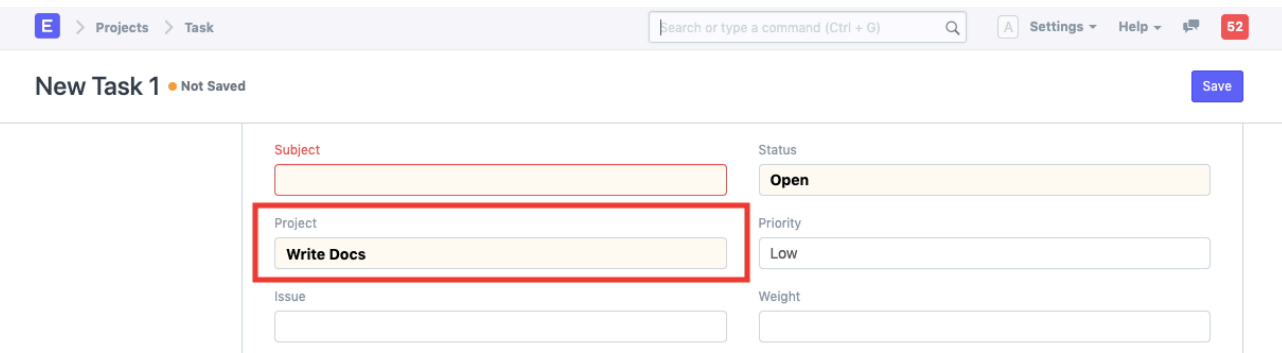


After saving, the default values will be set everywhere.

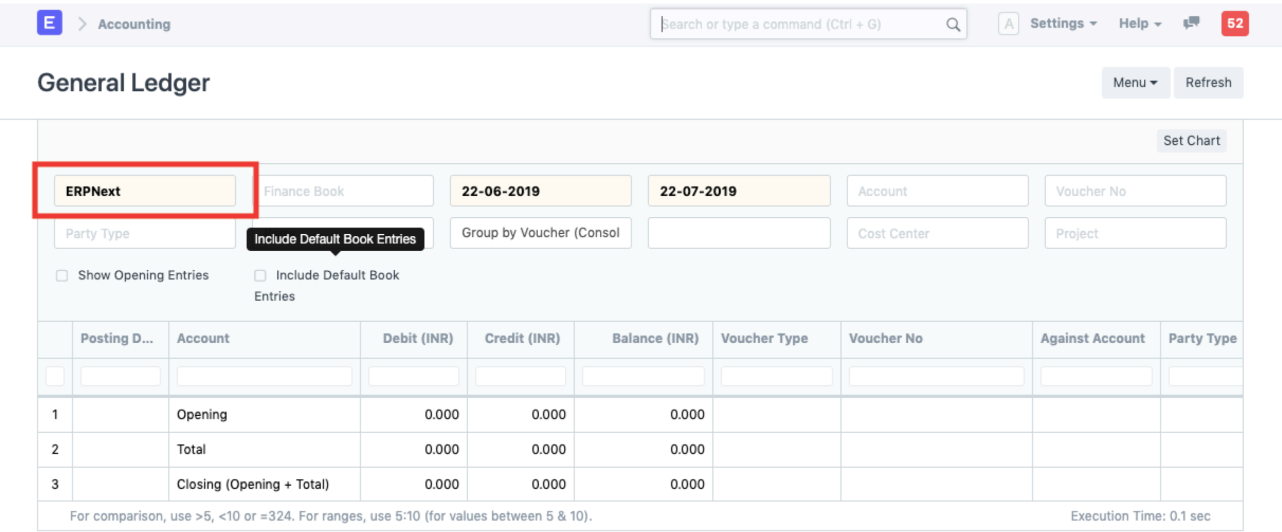
You can open a new Sales Order and check. The company field is set to the default Company.



Open a new Task. The 'Project' field is set to the default Project.



Open a report, for example, General Ledger. Company filter is set to the default Company.



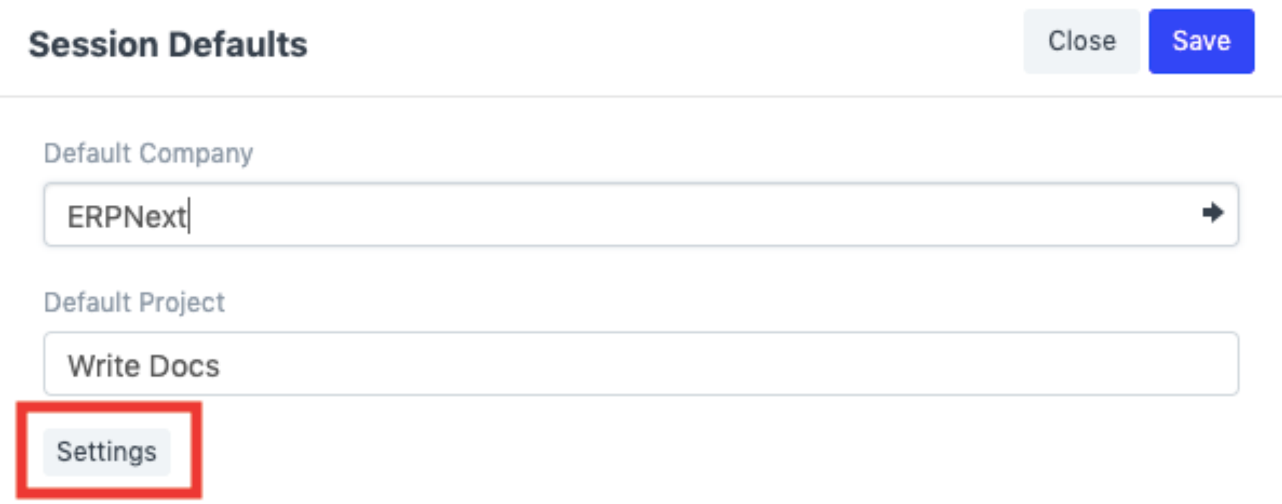
2. Features

2.1 Defaults cleared on logout

The default values are set for that particular user for the ongoing session. Once logged out, these default values are cleared.

2.2 'Settings' button visibility

The Settings button is only visible to the System Manager or to a person having permission to access 'Session Default Settings'. This button navigates you to Session Default Settings where you can add or remove the document types for which you want to set Session Defaults.

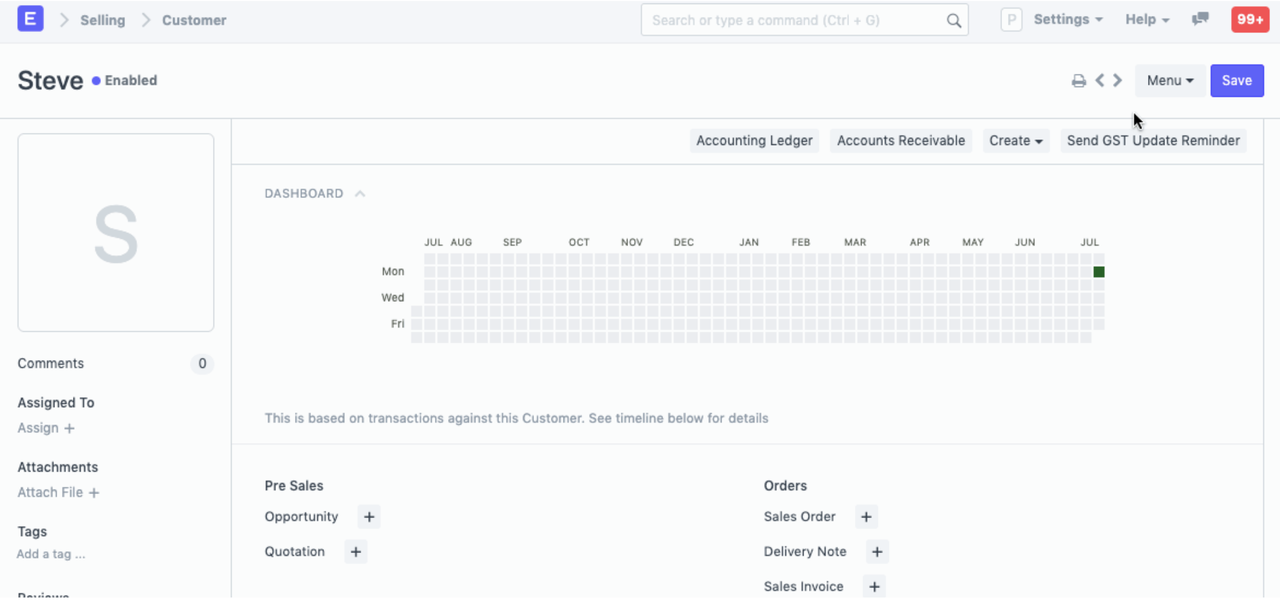


➢ Bulk Renaming of Records

Bulk Renaming allows renaming multiple records at once.

You can rename a document in ERP (if it is allowed) by going to **Menu > Rename** in the document.

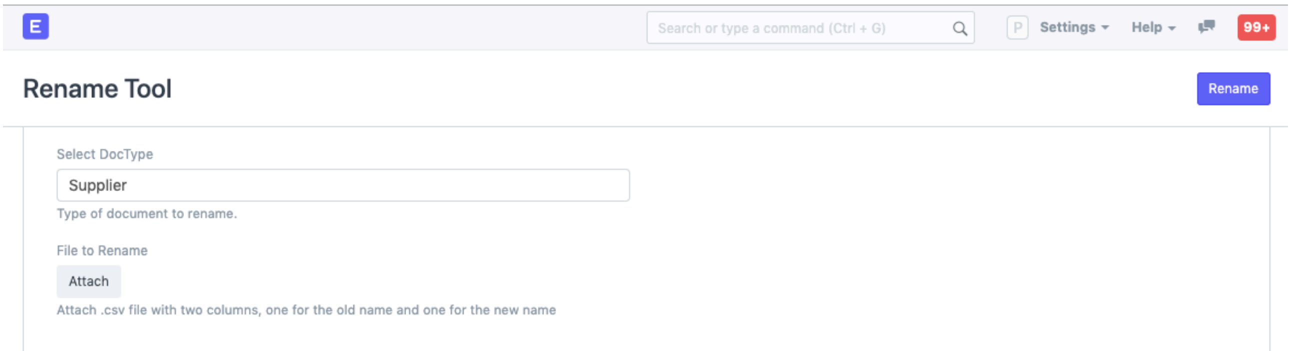
Alternatively, if you want to rename a whole bunch of records, use the Rename Tool. Go to:



Home > Settings > Rename Tool

This tool will allow you to rename multiple records at the same time.

To rename multiple records, upload a **.csv** file with the old names in the first column and the new names in the second column. Then click on **Upload**.



You can also merge documents by renaming them. For example, if you have a customer named Steve and a duplicate named Steve1, you can go to either of them, click on Menu > Rename and tick the 'Merge with existing' checkbox. This will merge all the linked documents of both documents. To know more, visit this page.

➢ Bulk Update

Bulk Update allows you to update a particular field of a DocType for all documents.

To access Bulk Update, go to:

Home > Settings > Bulk Update

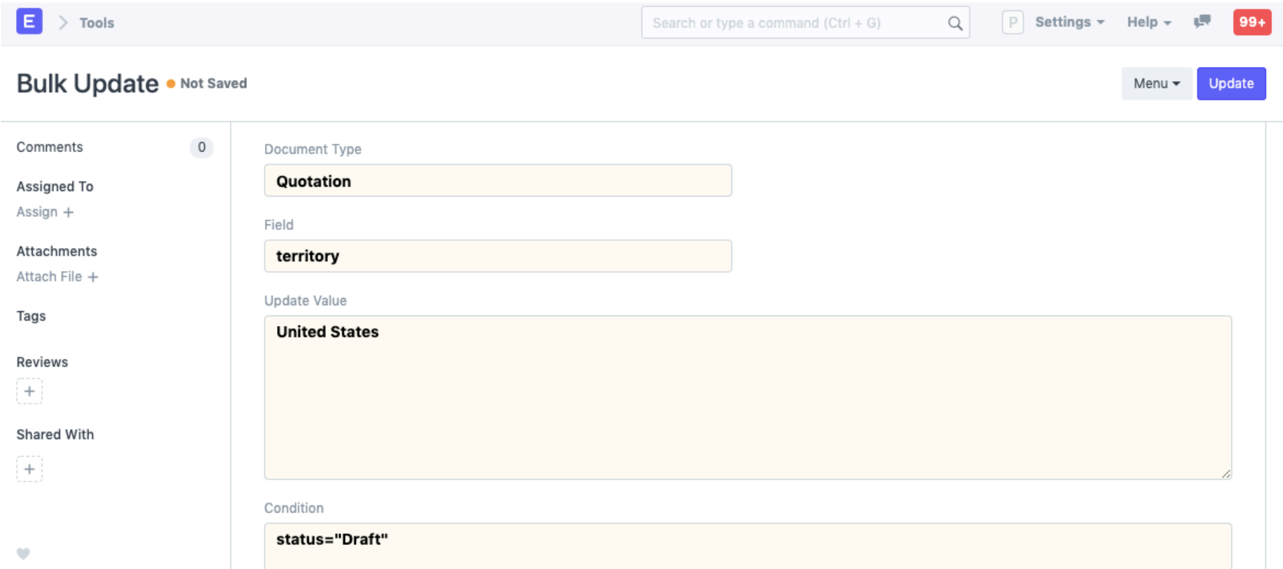
Consider that you have 20 quotations in which you had selected 'All Territories' and now you want to change the Territory to France. Instead of updating the individual quotations manually, you can use Bulk Update to update all 20 Quotations at once.

To do this,

1. Go to Bulk Update.
2. Select the Document Type, like Quotation.
3. Select the field to update, like territory.
4. Enter a **valid** new value to be updated.
5. Enter any conditions that apply, for example, status="Draft" will only affect documents in the Draft stage.

6. Select the limit, i.e. number of documents (Quotations) to be updated.

7. Click on Update.



Note: You can only update fields that can be updated normally in a particular stage. For example, valid till date cannot be updated for submitted Quotations.

➢ Domain settings

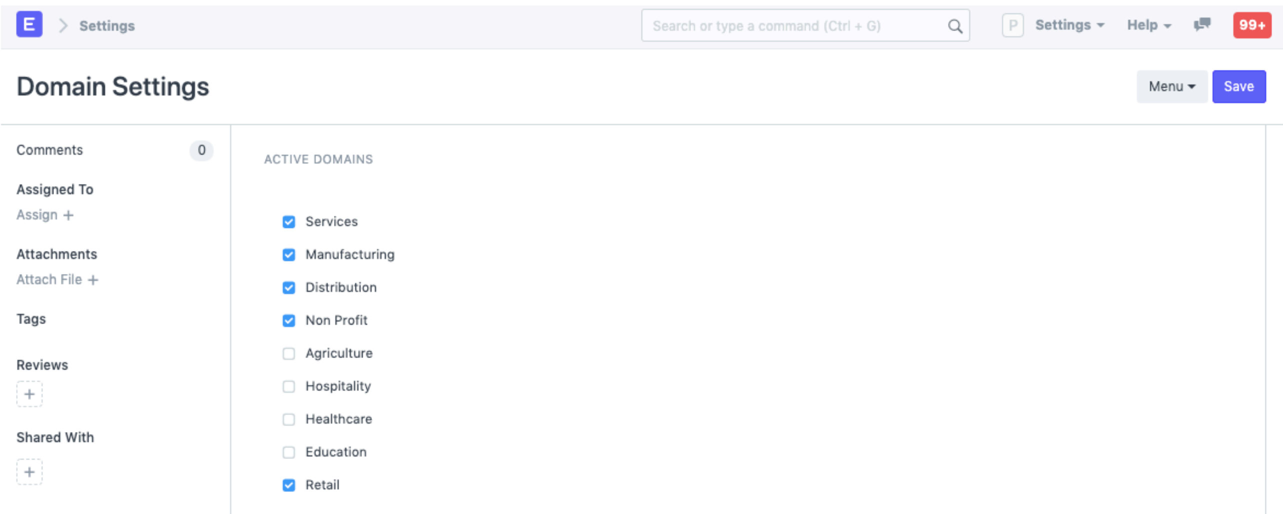
You can select the domains to be active globally under Domain Settings.

To access Domain Settings, go to:

Home > Settings > Domain Settings

If a domain is disabled, the following things will happen:

- The domain card will be unavailable on the home page
- The DocTypes related to the domain will no longer be accessible. For example, if you disable the Education module, Student and other DocTypes in Education will not be accessible.



➢ Energy Point System

Energy Points System is a rating/karma system that you can enable for your organization.

This system can be used to track the performance of each user.

To enable Energy Point System go to **Energy Point Settings** check **Enabled**.

1. How to use the Energy Point System?

To start using this system you need to create some Energy Point Rules (see section 3. How to create Energy Point Rules?) so that users can get energy points based on their activities.

2. What are Energy Point Rules?

Energy Point Rules store the information about the activity and the value of points to be allocated.

Energy Point Rule has the following fields:

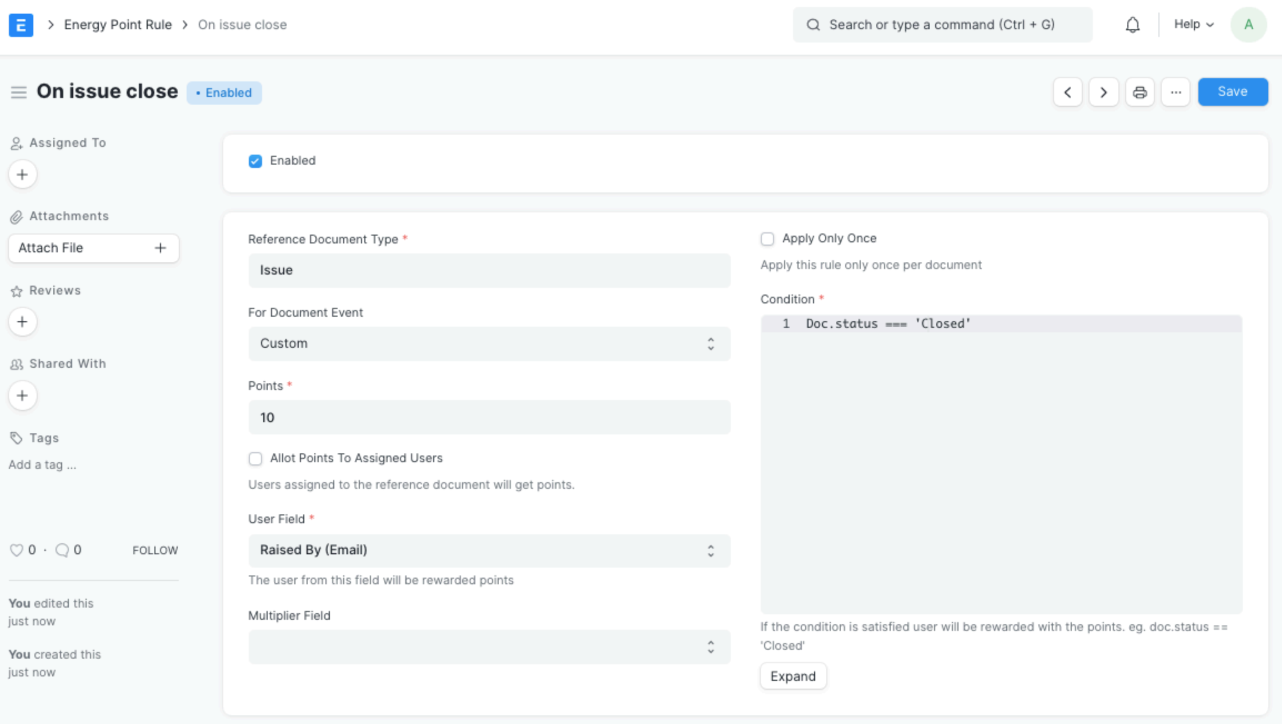
Field	Description
Reference DocType	Document Type you want to apply the rule on eg. Task, ToDo, Issue, etc.
For Document Event	Options: Save, Submit, Cancel, and Custom. **Note:** If "Custom" option is selected then the "Conditions" field becomes mandatory
Points	Points to be allocated.
Allot Points To Assigned Users	If checked, users assigned to the reference document will get points. eg. If users Reema and Jai are assigned to a particular task then both of them i.e, Reema and Jai will get points when the document fulfills the condition
User Field	Field from which user will be selected eg. Resolved By, Modified By, Owner, etc. can be used. If Modified By is selected, the last person to satisfy the doc condition will get the points.
Multiplier Field	Field which stores value for the multiplier. This field can take numeric and decimal values which will be multiplied with points defined in the rule. For example: 2 (multiplier) * 10 (points set in the rule) = 20 points
Condition	Condition for the point allocation. eg. doc.status == 'Closed' The above condition will check whether the status field in the document is 'Closed' and if yes then the points will be allocated to the user.
Apply Only Once	The rule will be applied only once per document.

Note: User Field and Multiplier Field are fetched from the reference doctype.

3. How to create Energy Point Rules?

Search for **Energy Point Rule** > create new Energy Point Rule

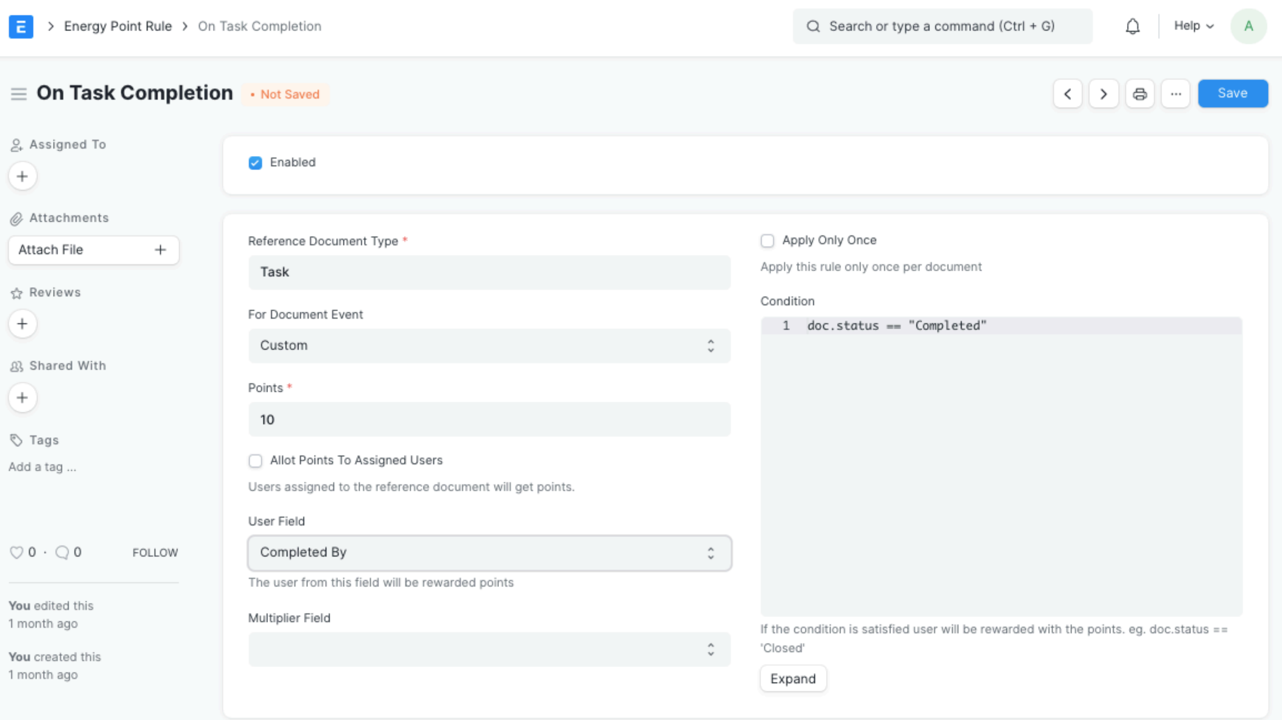
Take a look at the following example rule:



The screenshot above is the rule for **Issue Closing**. So when any user closes the issue he/she will be rewarded with **10** points.

Other cases can be covered similarly.

Suppose, you want to create a rule where a user gets points on completing a task, you can do so by creating following rule



4. Features:

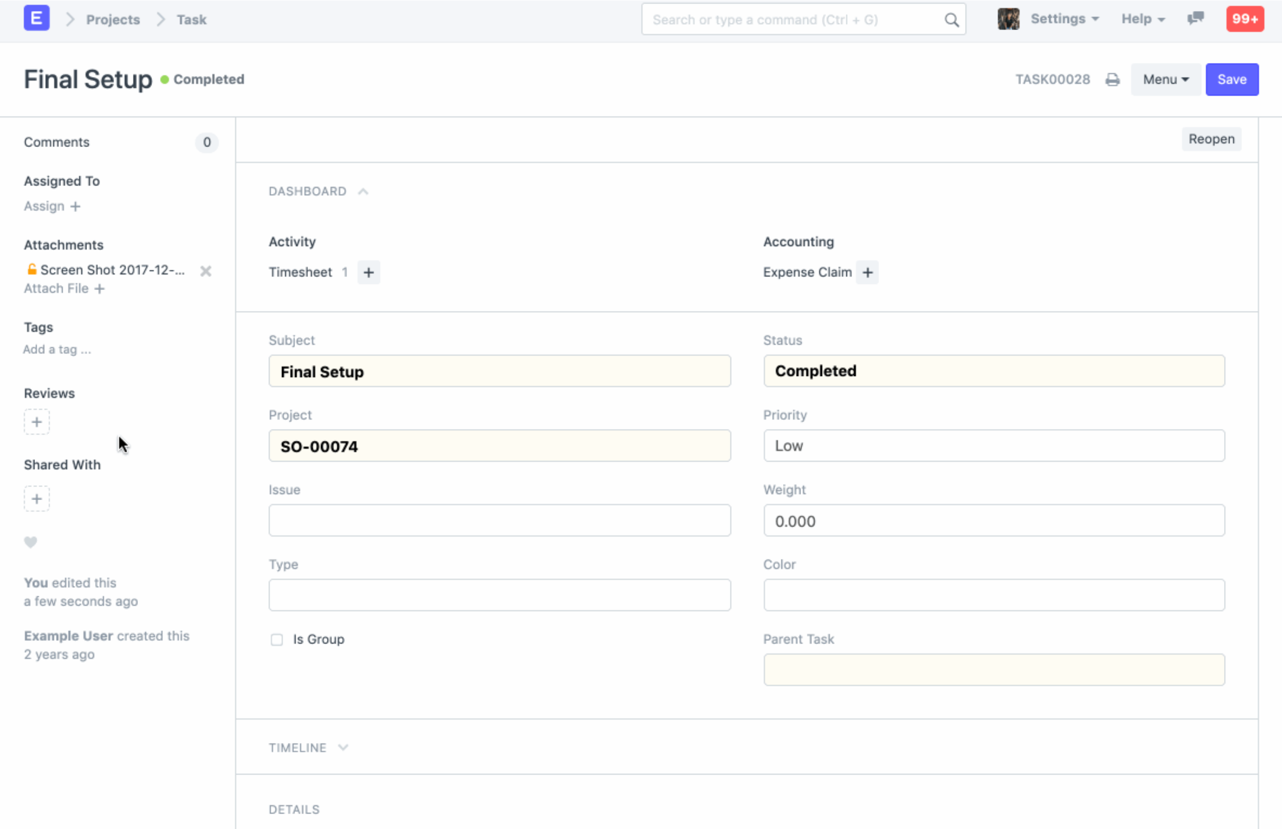
4.1 Auto Point allocation

Based on energy point rules created, users will automatically get points when they complete activities which are tracked using the Energy Point System.

4.2 Review System

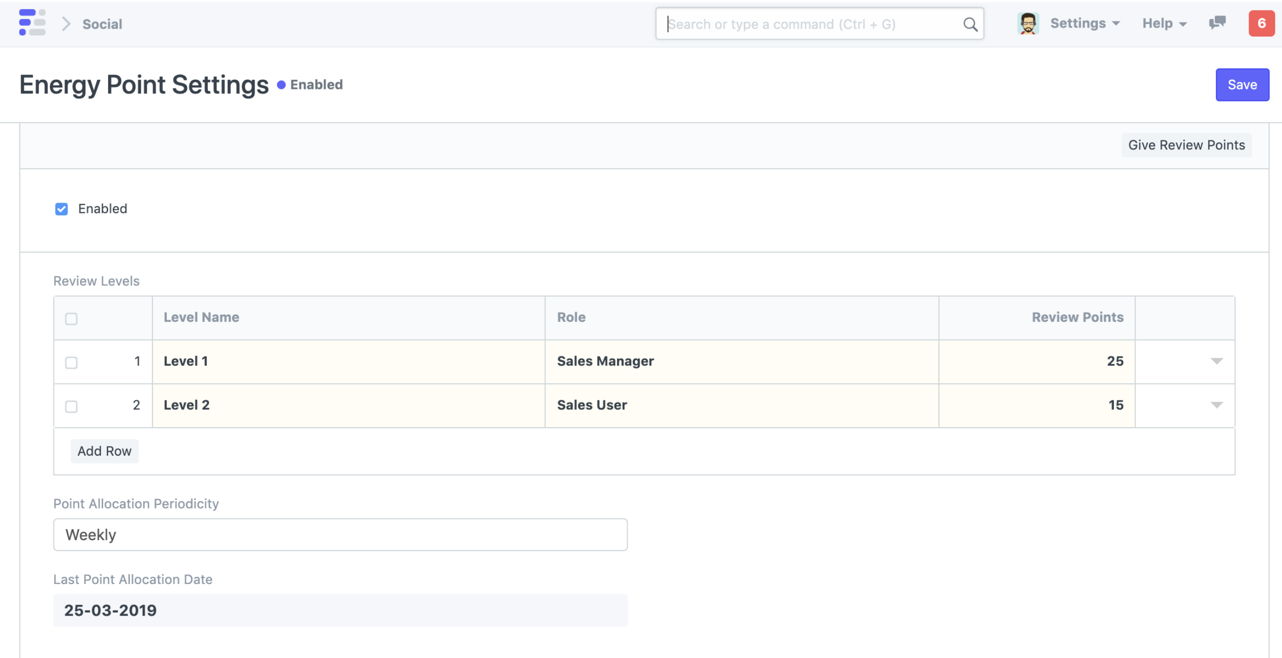
Review system can be used to "Appreciate" or "Criticize" someone's work.

Check out the following GIF for the review process.



For reviewing, the user needs to have review points which can be assigned by System Manager through **Energy Point Settings**.

You can also setup auto review point allocation from 'Energy Point Settings':



4.3 Leaderboard

Go to Social Home > Leaderboard (side navigation bar)

The leaderboard shows the user's standing in the organization.

E > Social Home

Search or type a command (Ctrl + G)

Settings Help 99+

Leaderboard

Search User

This Month

#	User	Energy Points	Review Points	Points Given
1	Nabin Hait *No Bio*	1743	50	100
2	Jai Chavan You know who I am.	1586	245	405
3	Umair Sayed *No Bio*	1430	180	95
4	Aditya Hase I write executable pseudocode	1285	150	0
5	Faraz Khatri *No Bio*	1278	150	0
6	Rohit Waghchaure *No Bio*	1271	100	50
7	Harshit Agrawal Seek Discomfort!	1256	0	150
8	Mitali Deshpande *No Bio*	1139	30	180
9	Ketan Desai Make your Influence awesome	1100	60	90

DATA PRIVACY

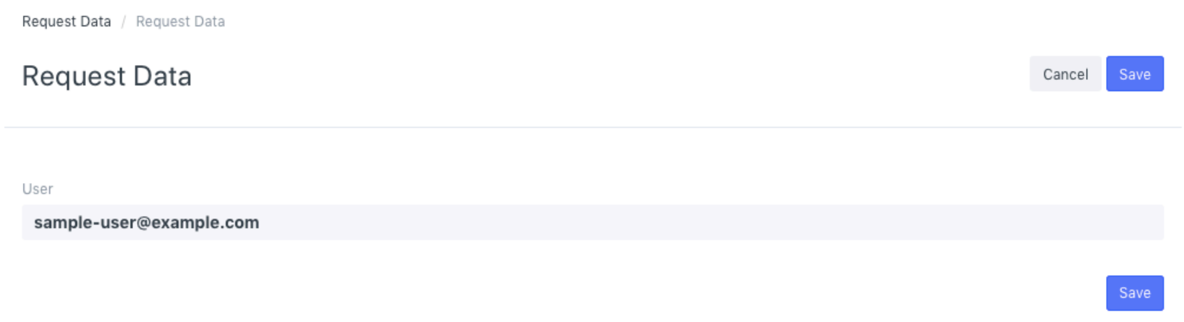
➢ Personal Data Download

As a part of GDPR compliance, ERP has Personal Data Download.

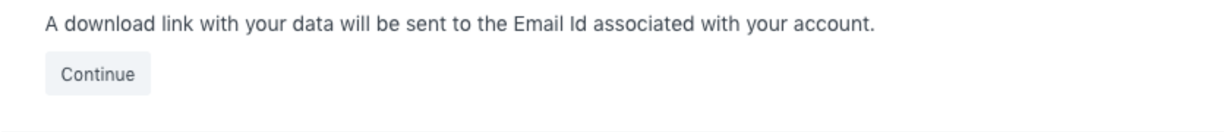
Personal data download tool enables a user to automatically download all the personal data they have generated while using ERP. This includes personally identifiable data from your user account like: username, full name, birth date, phone numbers, mobile numbers, location, interests, bio, email signature, Email, Contact, Address, Communication, etc. It also includes data from Leads and Opportunities, the details you have saved like phone numbers, mobile numbers, fax, website, and name.

1. How to request user data download

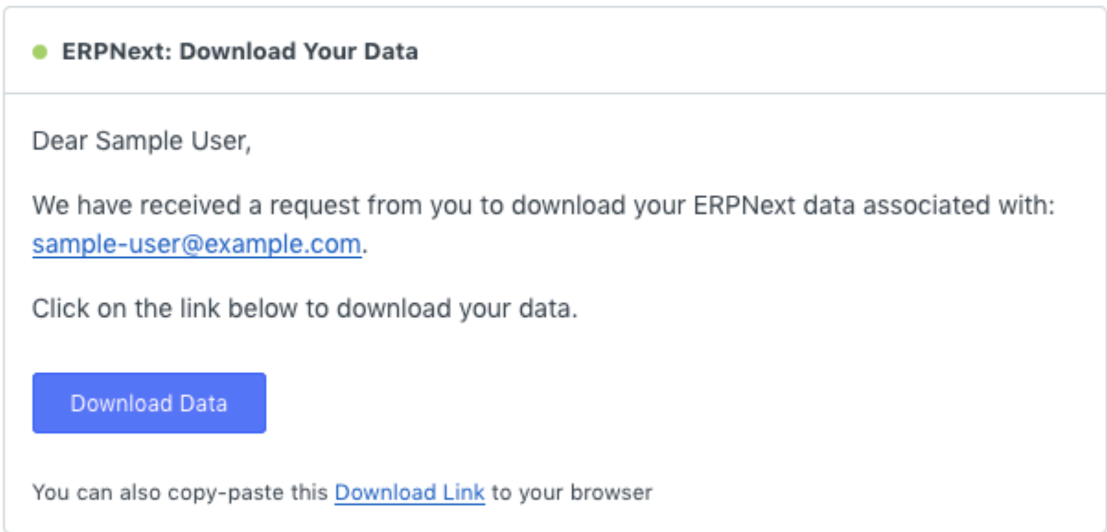
1. To begin downloading data, the user has to **logged in** and visit [host-name]/request-data (e.g. ERP.com/request-data) in the URL field.



2. After submitting your request, you will receive a success response.



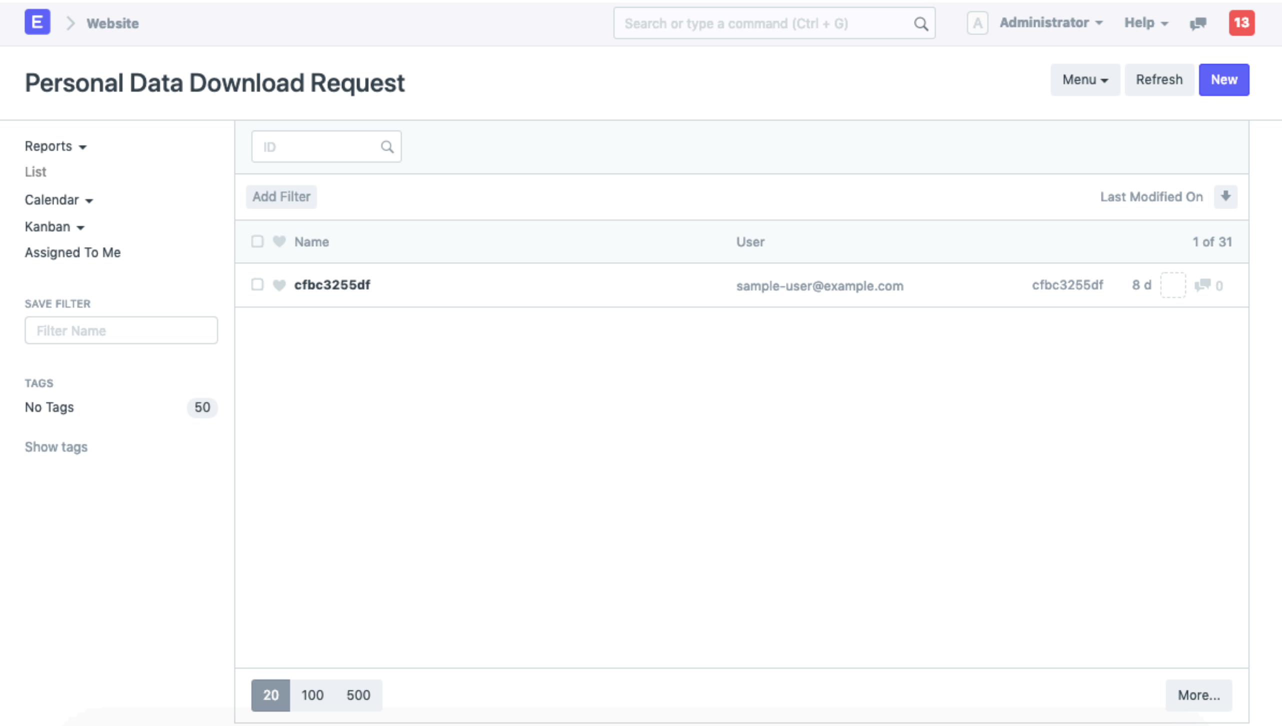
3. This will send an email with a download link of the data to the email address associated with the user.



The file available for download will be in the JSON format.

2. Personal Data Download Request DocType

The request is also recorded in the DocType "Personal Data Download Request", the file-link that is sent to the user via email is also attached to the doc. Search for Personal Data Download Request from the search bar.



➢ Personal Data Deletion

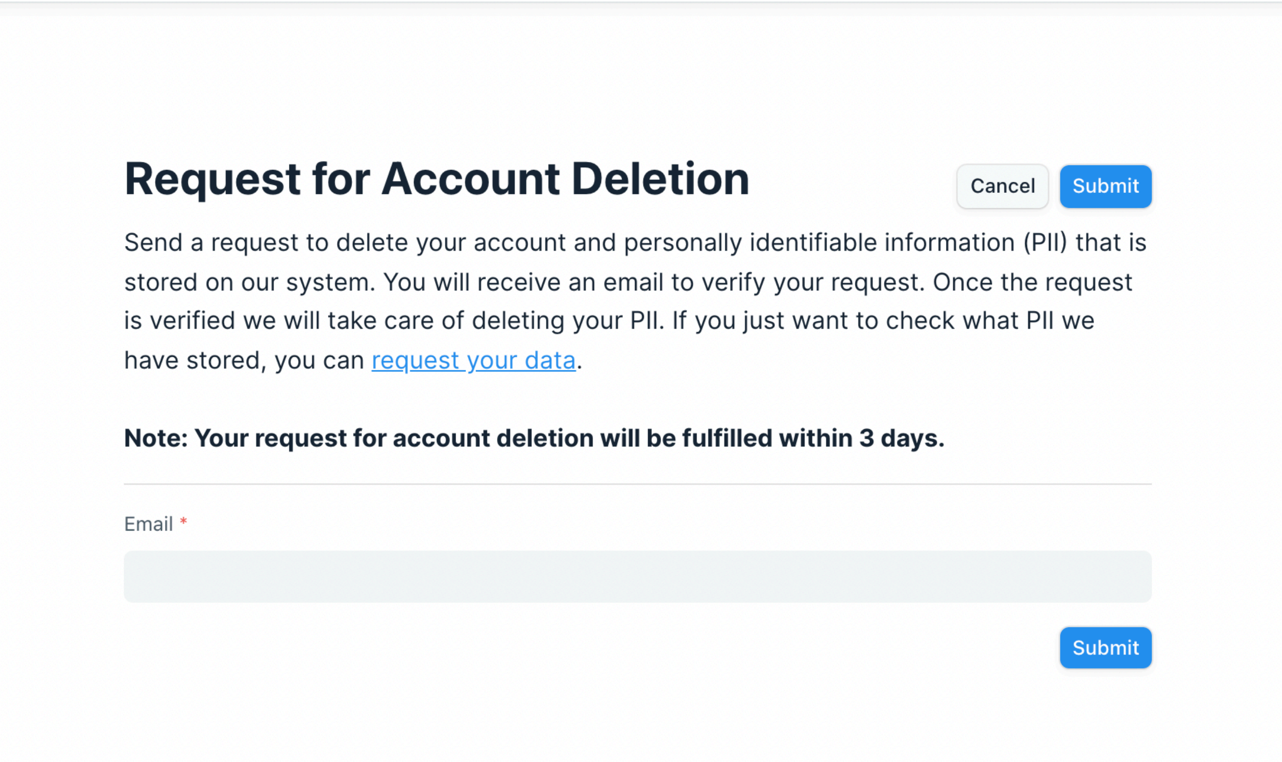
As a part of GDPR compliance, ERP has Personal Data Deletion.

Personal data deletion tool enables a user to delete their account and anonymize all the personally identifiable data a user has generated while using ERP. That is, personally identifiable information will be randomized. This includes personally identifiable data from your user account like: username, full name, birth date, phone numbers, mobile numbers, location, interests, bio, email signature, Email, Contact, Address, Communication, etc. It also includes data from Leads and Opportunities, the details you have saved like phone numbers, mobile numbers, fax, website, and name.

However, this excludes data that is required by law to be maintained by a business.

1. How to request account deletion

1. To begin deleting users account and personally identifiable data, you need to visit [host-name]/request-for-account-deletion (e.g. example.ERP.com/request-for-account-deletion) in the URL field.



Request for Account Deletion

Cancel Submit

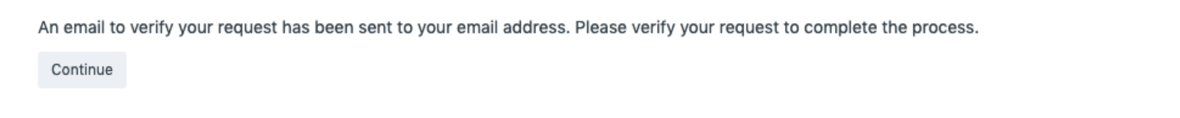
Send a request to delete your account and personally identifiable information (PII) that is stored on our system. You will receive an email to verify your request. Once the request is verified we will take care of deleting your PII. If you just want to check what PII we have stored, you can request your data.

Note: Your request for account deletion will be fulfilled within 3 days.

Email *

Submit

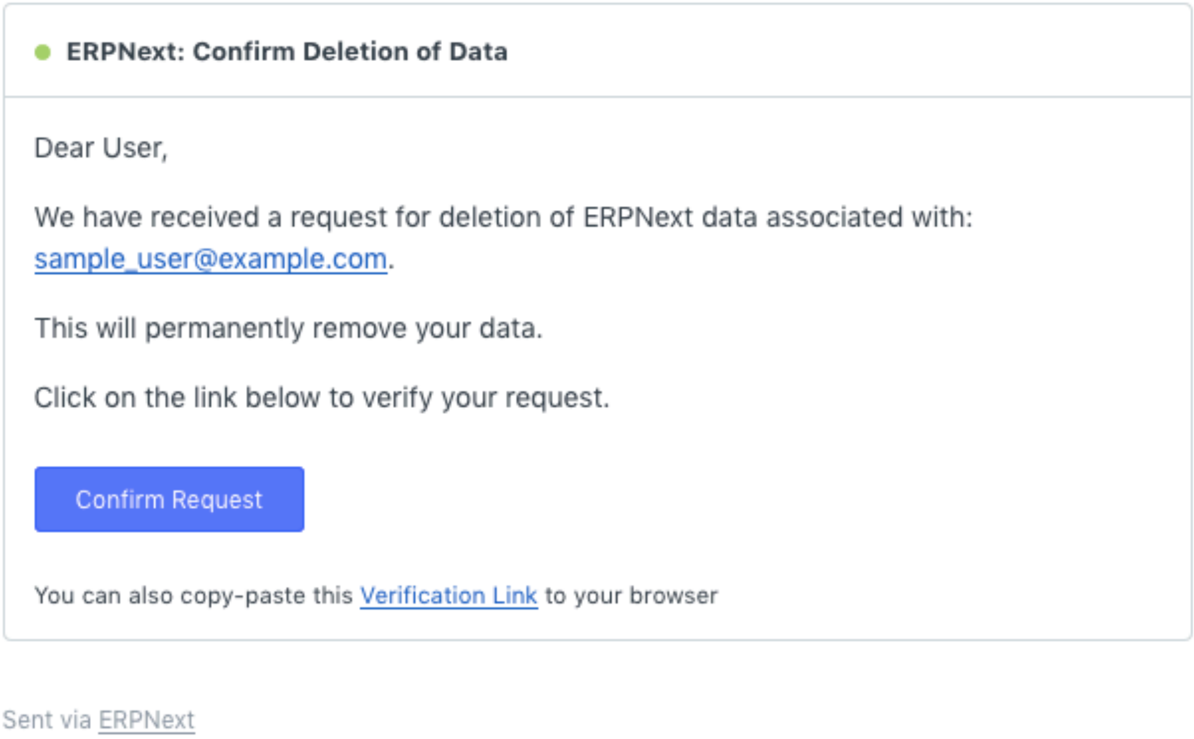
2. Enter the email associated with your ERP account. After submitting your request, you will receive a success response.



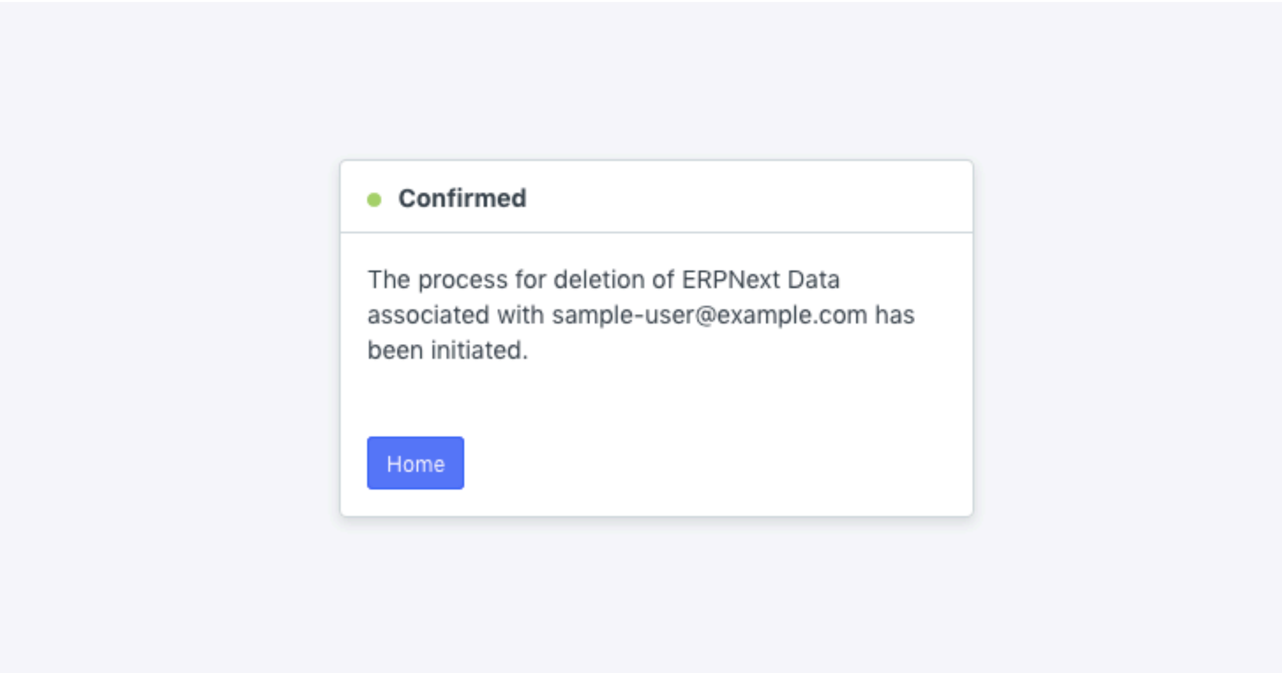
An email to verify your request has been sent to your email address. Please verify your request to complete the process.

Continue

3. This will send an email with a verification link to delete data to the email address associated with the user.

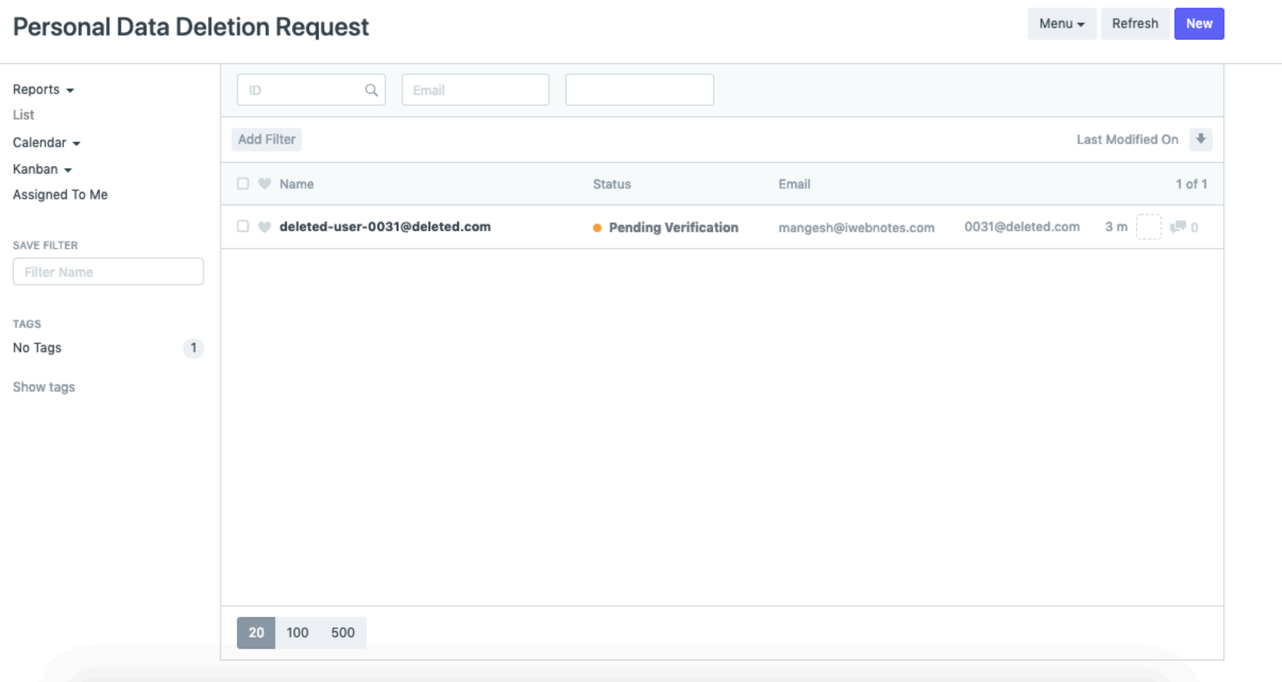


4. Once the user clicks on the verification link. A confirmation message will be displayed.



2. How deleting user's personal data works

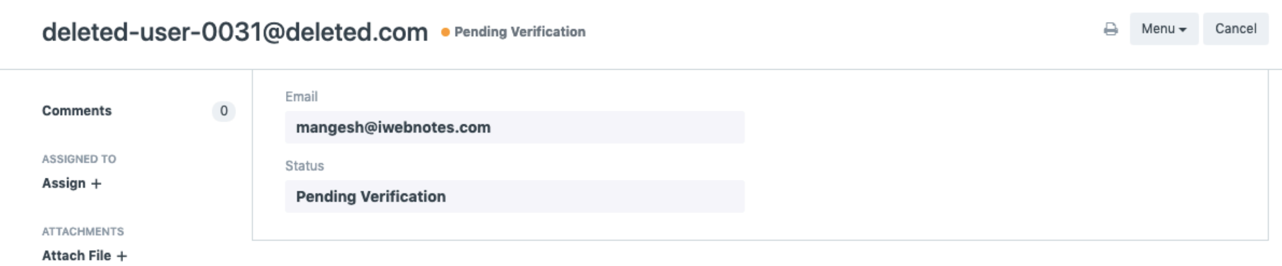
The request to delete data is recorded in the doctype "Personal Data Deletion Request".



This doctype maintains three states of status to complete the process of removal of user data.

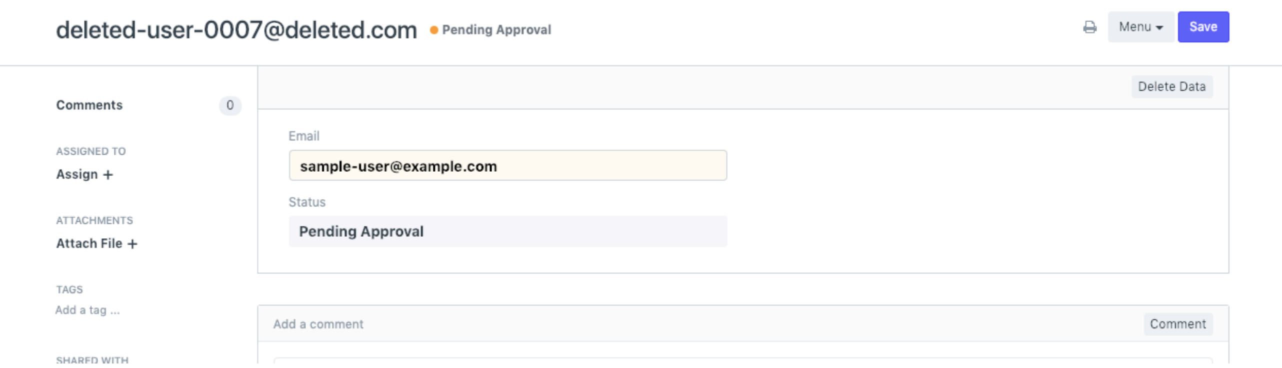
2.1 Pending Verification

This status indicates that the user has requested data deletion via the web-form. However, verification of this request is still pending. Search for Personal Data Deletion Request from the search bar.



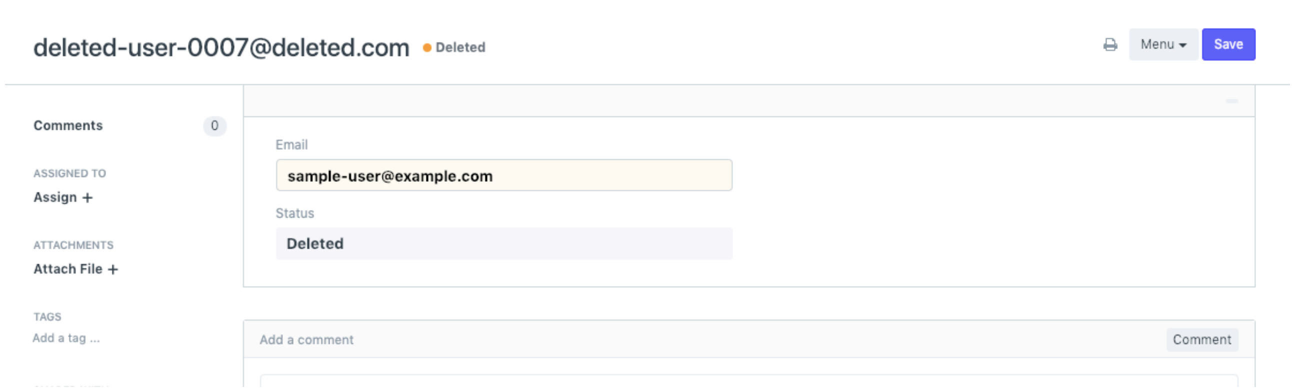
2.2 Pending Approval

This indicates that the user has verified the request via email. This enables the option of "Delete Data" for System Managers.



2.3 Deleted

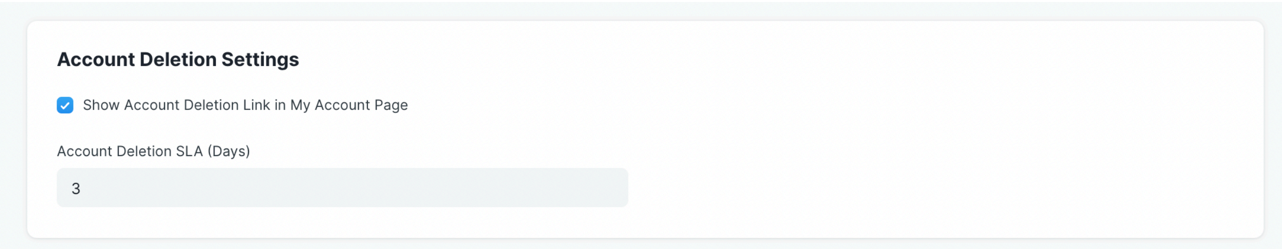
This indicates that the System Manager has clicked on the "Delete Data" button. This means that the user's personally identifiable data has been anonymized.



3. Setting SLA for Personal Data Deletion Request.

You can also set an SLA for Personal Data Deletion Request through Website Settings. This will appear on the web form description.

- Go to Website Settings
- Scroll to the section called Account Deletion Settings
- In the **Account Deletion SLA (Days)** field set the number of days within which users request for Account Deletion will be fulfilled.
- If you enable **Show Account Deletion link in My Account page**, the form link will be visible to users on the My Account Page of the website



ARTICLES-CONFIGURATIONS

➢ Manage Tree Structure Masters

Some of the masters in ERP are maintained in tree structure. Tree structured masters allow you to set Parent master, and Child masters under those Parents. Setting up this structure allows you creating intelligent report, and track growth at each level in the hierarchy.

Following is the partial list of masters which are maintained in the tree structure.

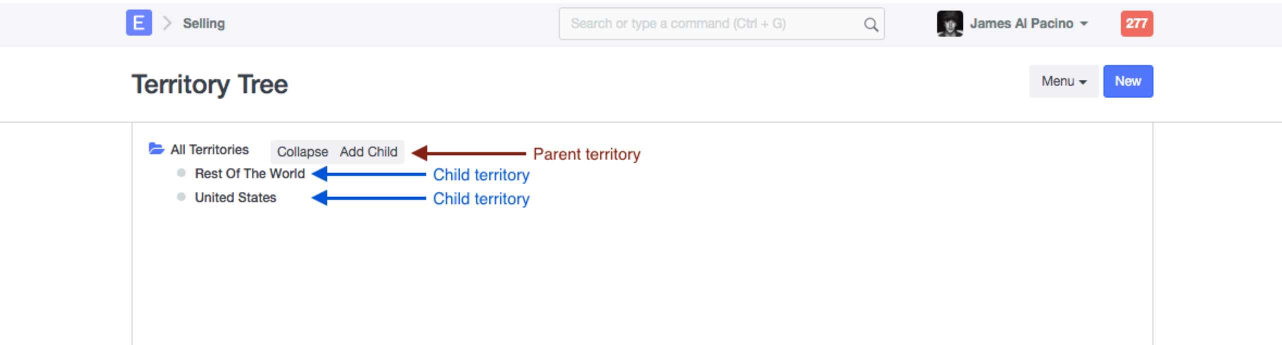
- Chart of Accounts
- Chart of Cost Centers
- Customer Group
- Territory
- Sales Person
- Item Group

Following are the steps to manage and create record in the tree structured master. Let's consider Territory master to understand managing tree masters.

Step 1 : Go to Master

Selling > Setup > Territory

Step 2 : Parent Territory



When click on Parent territory, you will see option to add child territory under it. All default Territory groups will be listed under Parent group called "All Territories". You can add further Parent or child Territory Groups under it.

Step 3: Add new Territory

When click on Add Child, a dialog box will provide two fields.

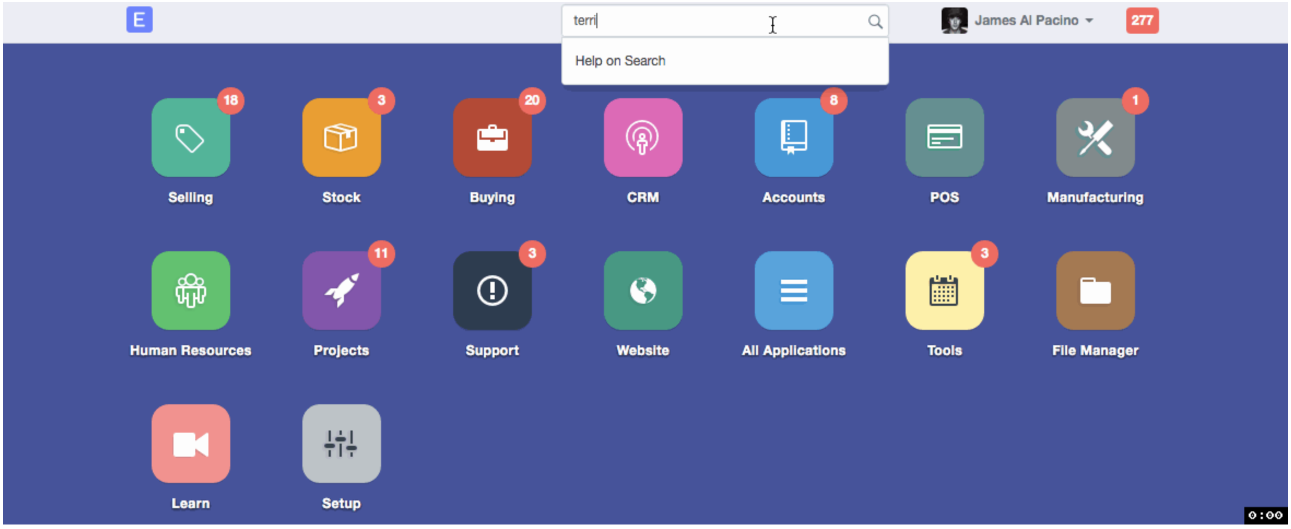
Territory Group Name

Territory will be saved with Territory Name provided here.

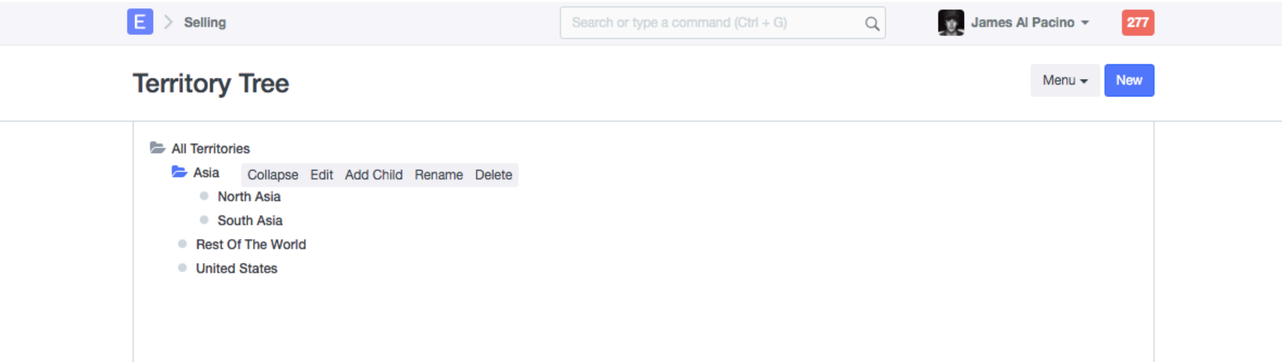
Group Node

If Group Node selected as Yes, then this Territory will be created as Parent, which means you can further create sub-territories under it. If select No, then it will become child Territory which you will be able to select in another masters.

Only child Territory Groups are selectable in another masters and transactions.



Following is how Child Territories will be listed under a Parent Territory.



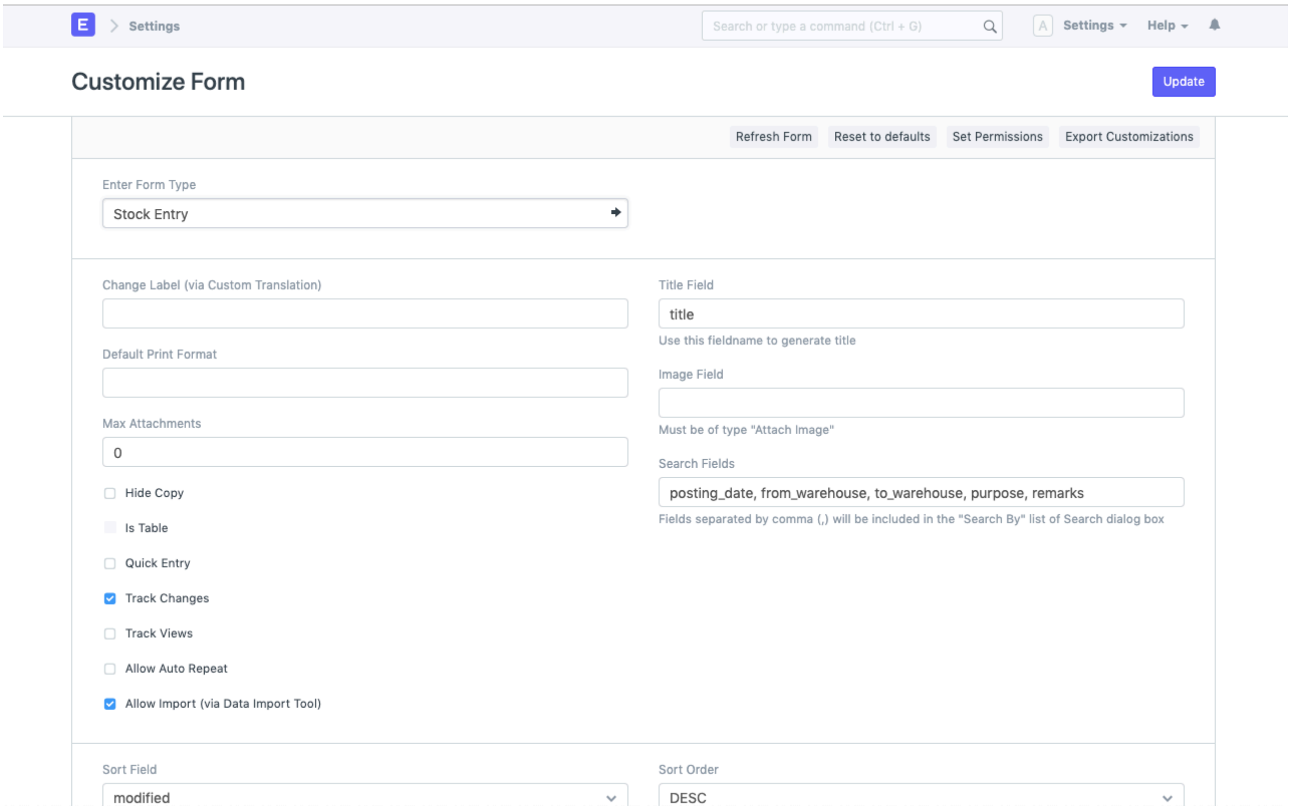
Following this steps, you can manage other tree masters as well in ERP.

➢ Set default values for any field

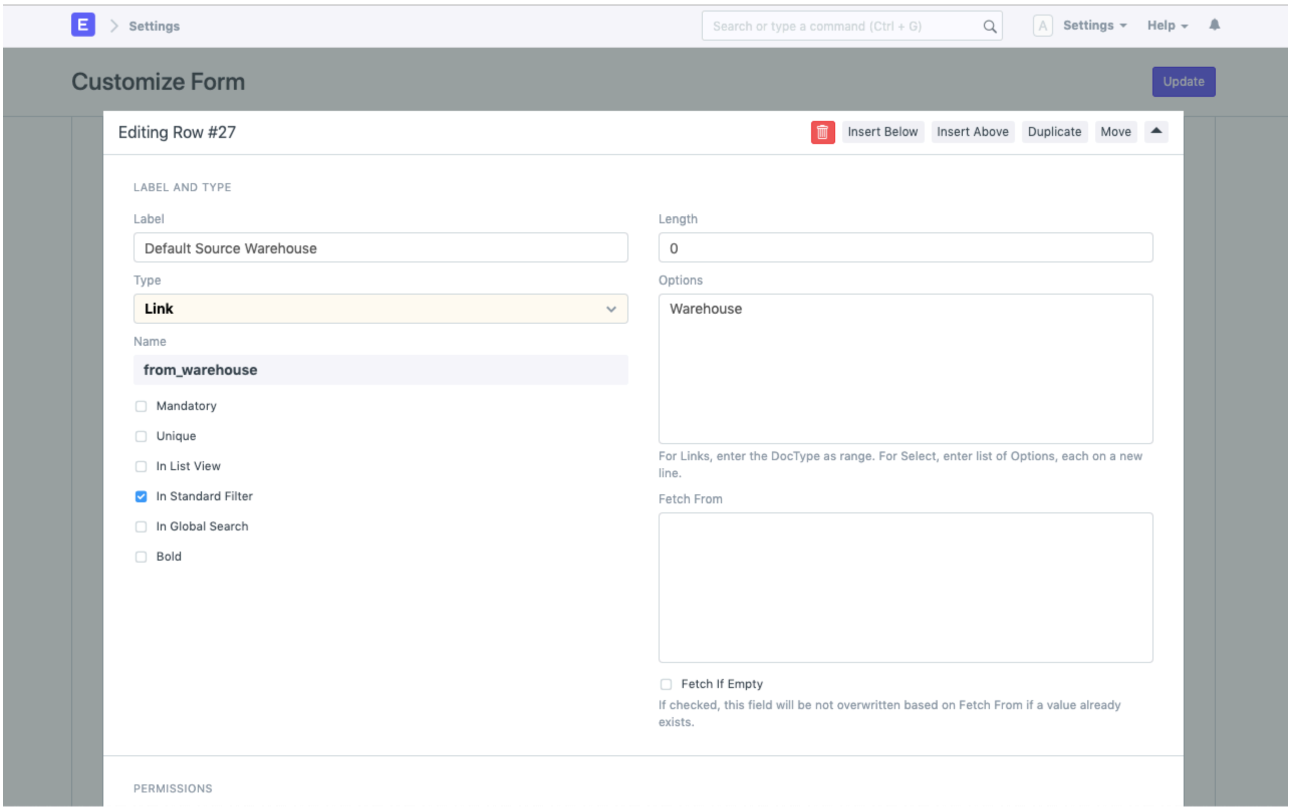
Using **Customize Form**, we can set a *default* value for any field of any Doctype in ERP.

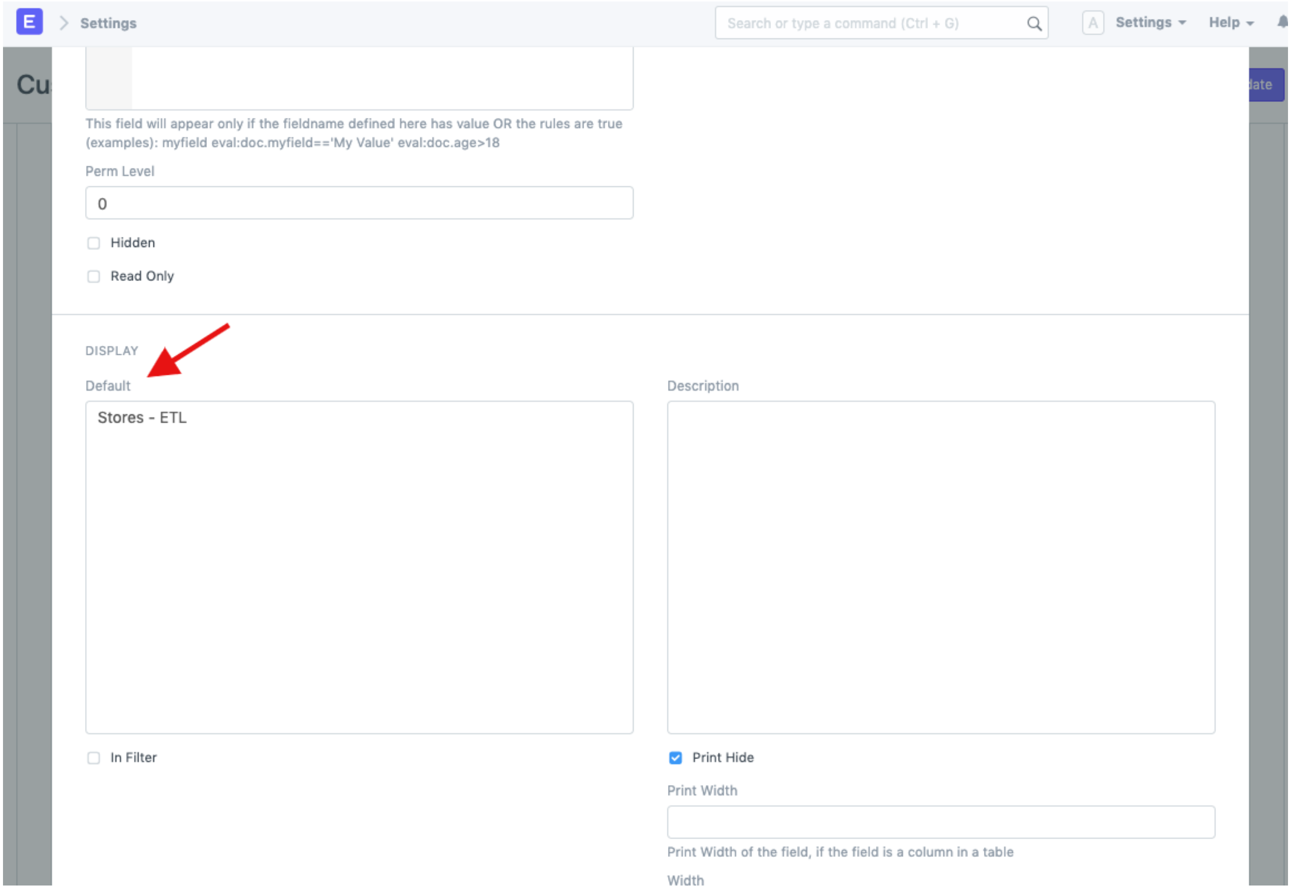
Steps:

1. Open Customize Form using awesome search bar or via Menu options of any DocType. This will open a screen where you can view all the fields that comprise in this DocType.

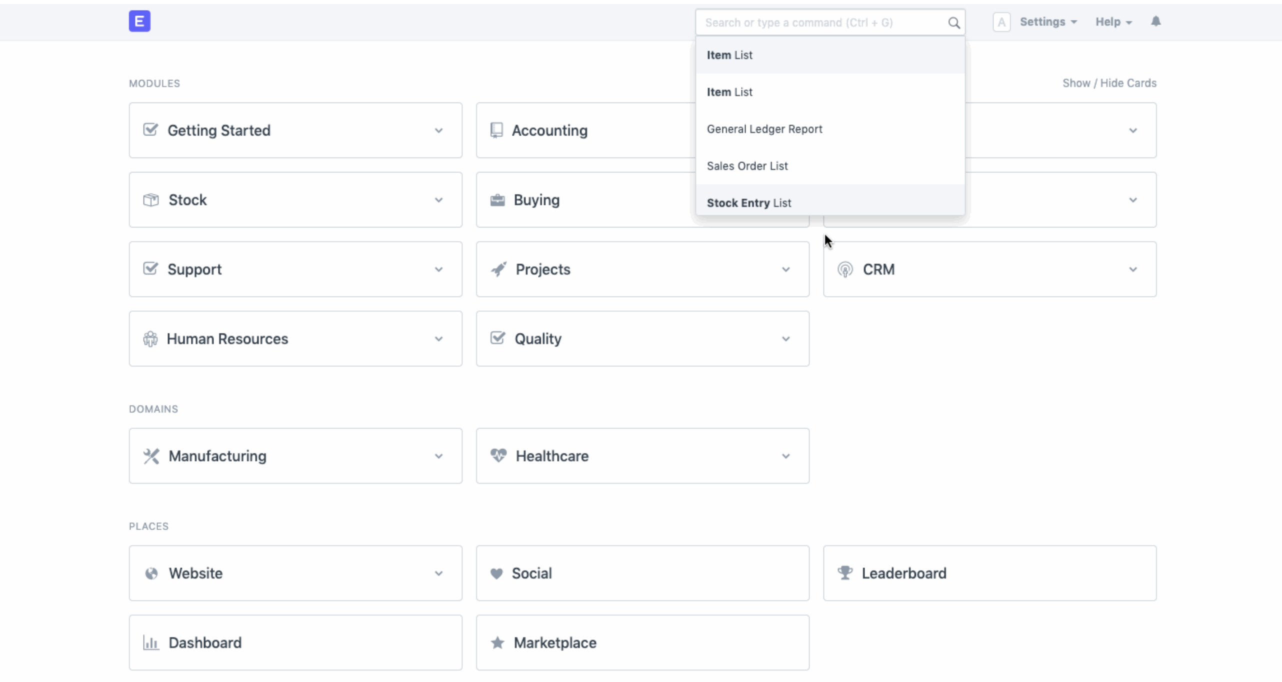


2. Expand the field for which you want to store a default value and enter it under Display -> Default





Check out the below GIF where we have set *default* value as **Stores - ETL** for field "Default Source Warehouse" in DocType Stock Entry:



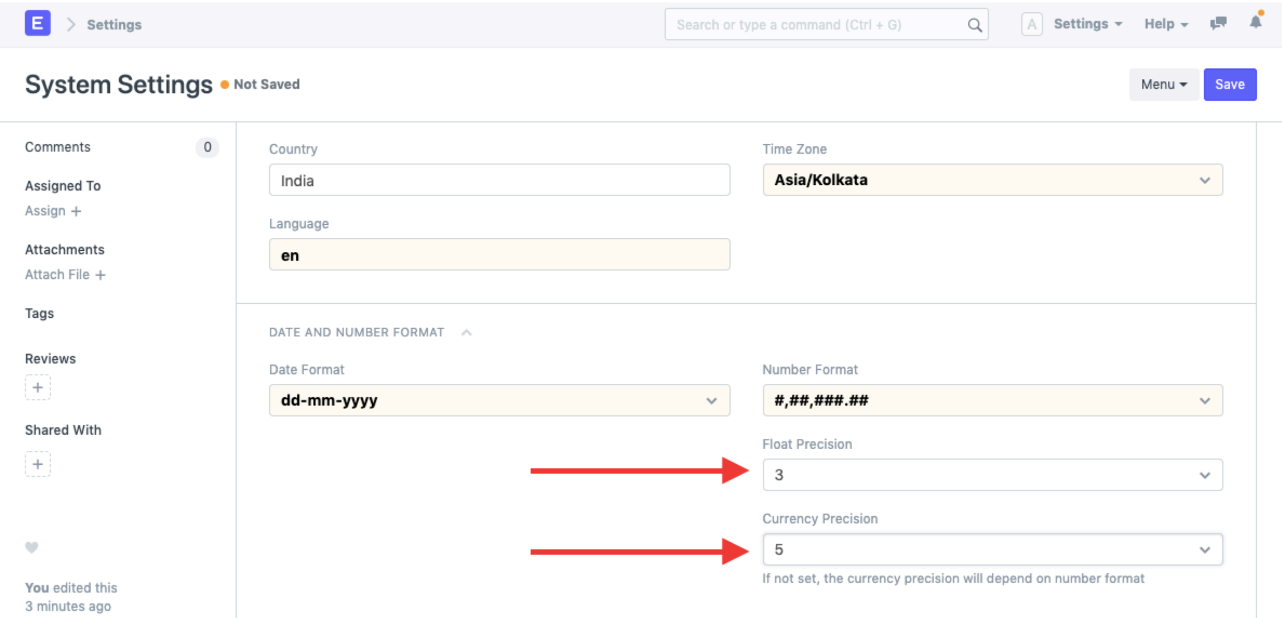
➢ **Set Precision**

In ERP, default precision for **Float**, **Currency** and **Percent** field is three. It allows you to enter value having value upto three decimal places.

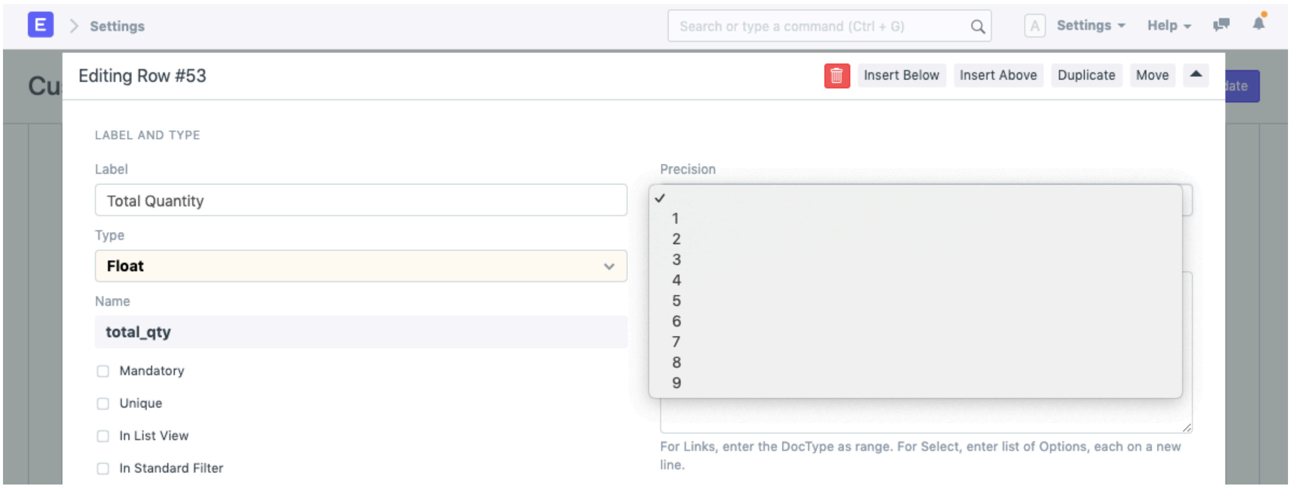
You can also change/customize the precision settings globally or for a specific field.

To change the precision globally, go to:

Home > Settings > System Settings



Alternatively, you can also set field specific precision. To do that go to [Customize Form]() and select the DocType there. Then go to the specific field row and change precision. Precision field is only visible if field-type is one of the Float, Currency and Percent.



➢ Set Language

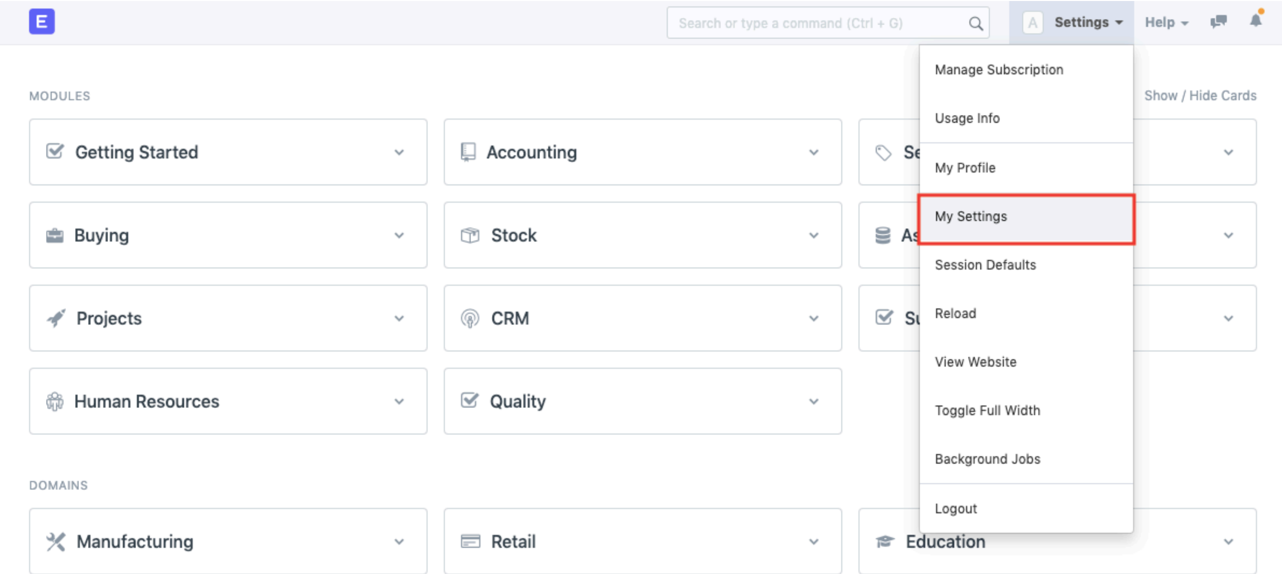
ERP is an multi-lingual application. It allows each user to select preferred language.

Following the below steps to know a User can customize the language in their account.

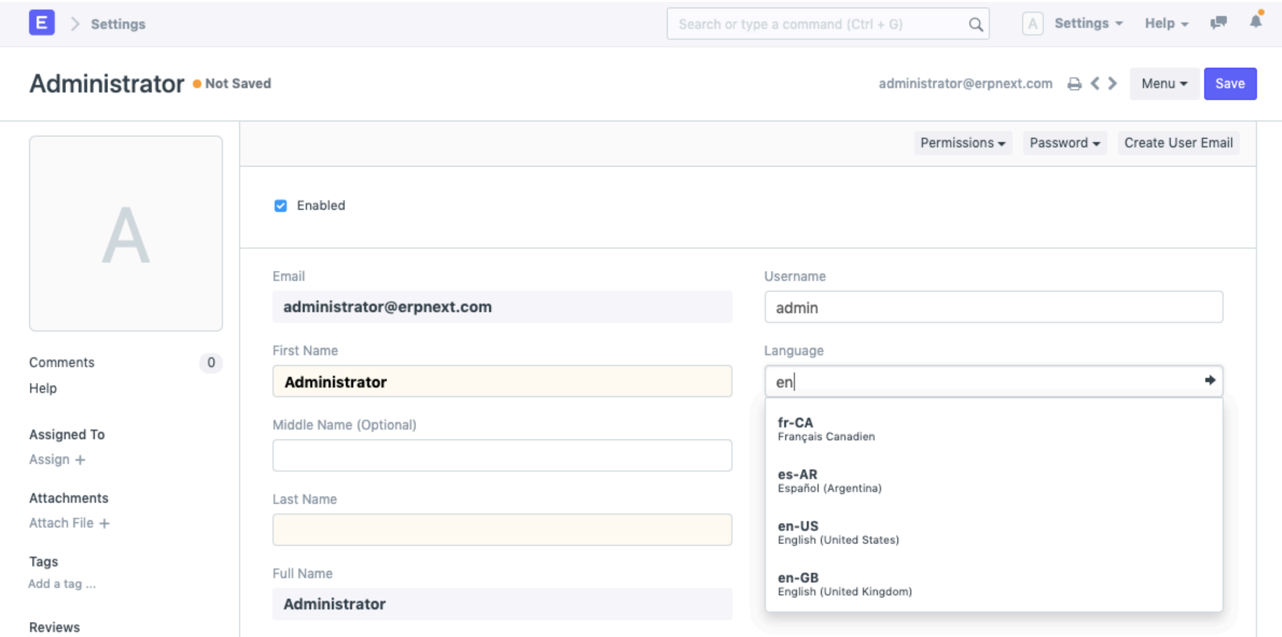
1. Setting Language in User's Account

Following are the steps to change language in your ERP account.

1.1 Go to My Setting



1.2 Select Language



1.3 Save User

On saving User after selecting the language, your ERP account will refresh automatically and will be translated to your preferred language.

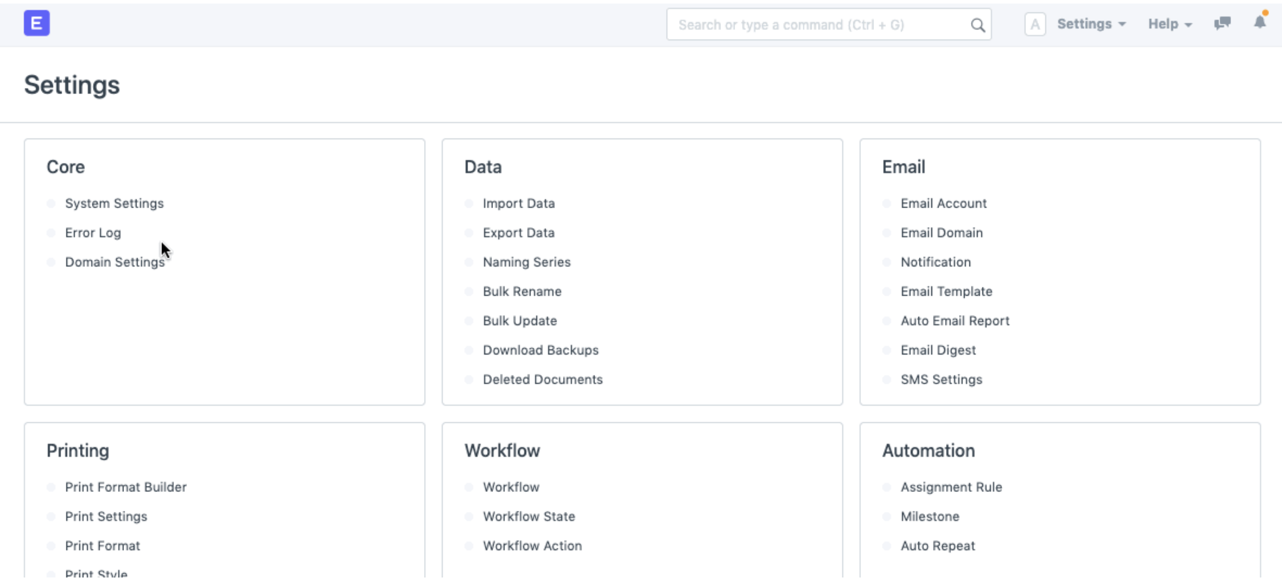
If you are a System Manager, you will be able to change the language for other users as well.

2. Set Language Globally for an Account

2.1 Go to Setup

Home > Settings > System Settings

Set Language



Save

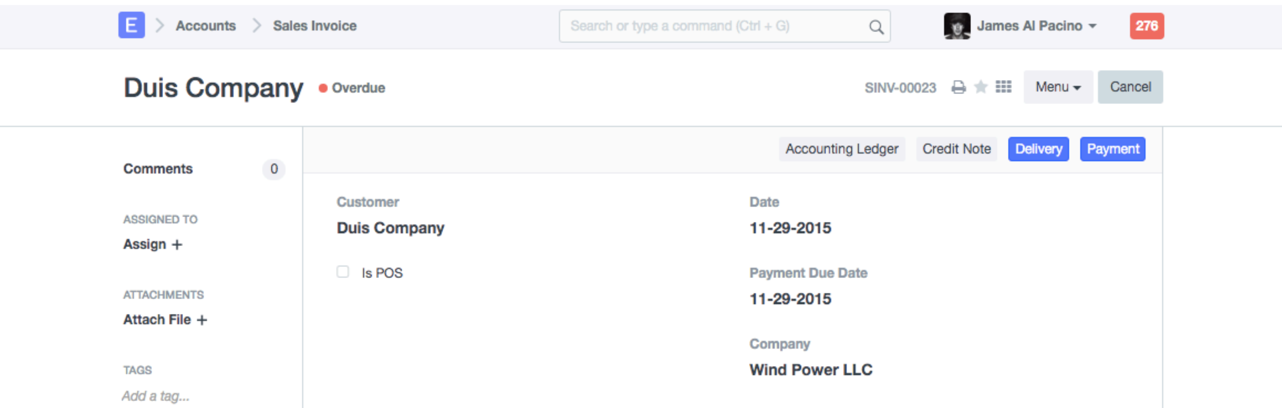
Save System Settings, and refresh your ERP account. On refreshing, the language would be updated to your preferred language.

➢ Edit Submitted Document

To edit a submitted document, you need to cancel it first. Following are steps to edit submitted document. These steps assume you have the appropriate permissions for cancelling and editing a document.

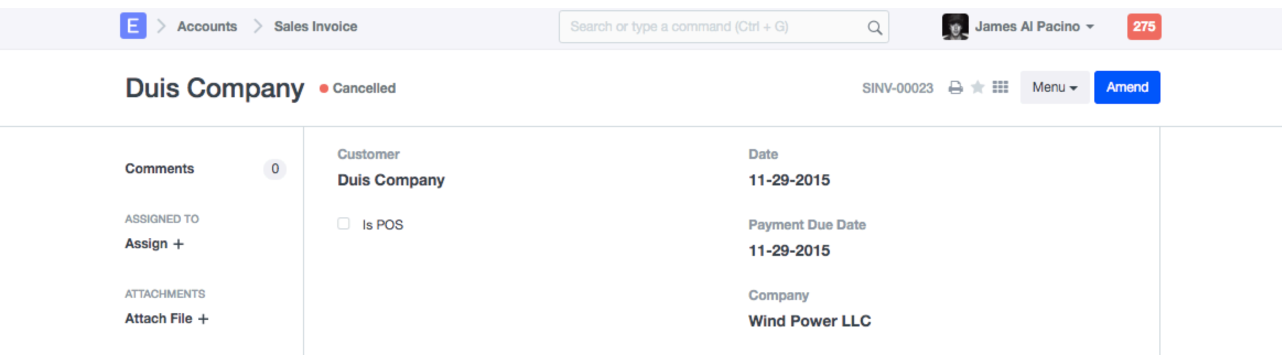
Step 1: Cancel Submitted Document

You will find Cancel button on upper right corner of submitted document.



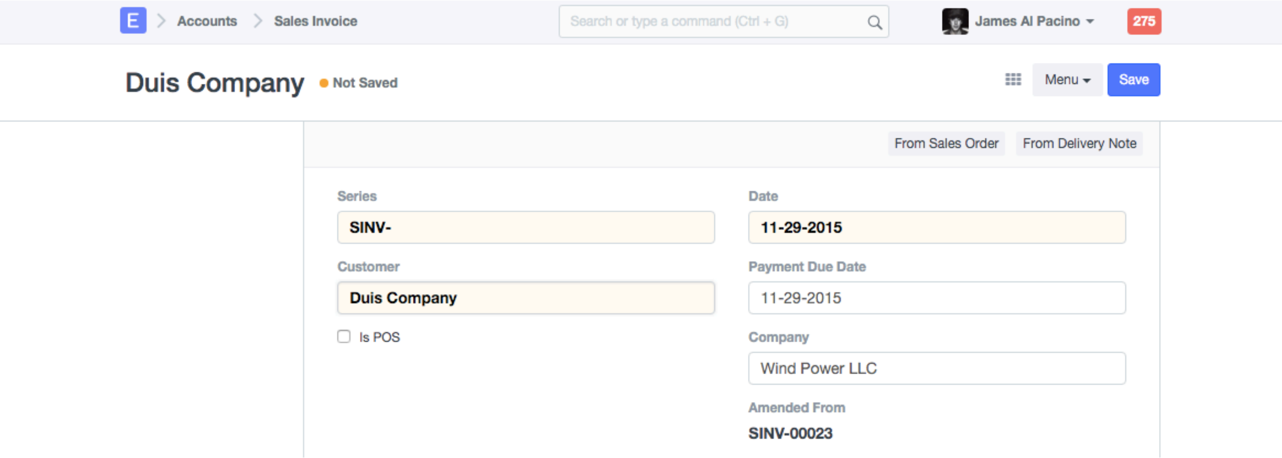
Step 2: Amend the document

On cancellation of submitted document, Amend button will be became visible.



Step 3: Save and Submit the document

On clicking Amend button, same document will become editable again. After Making required changes, save and submit the document.



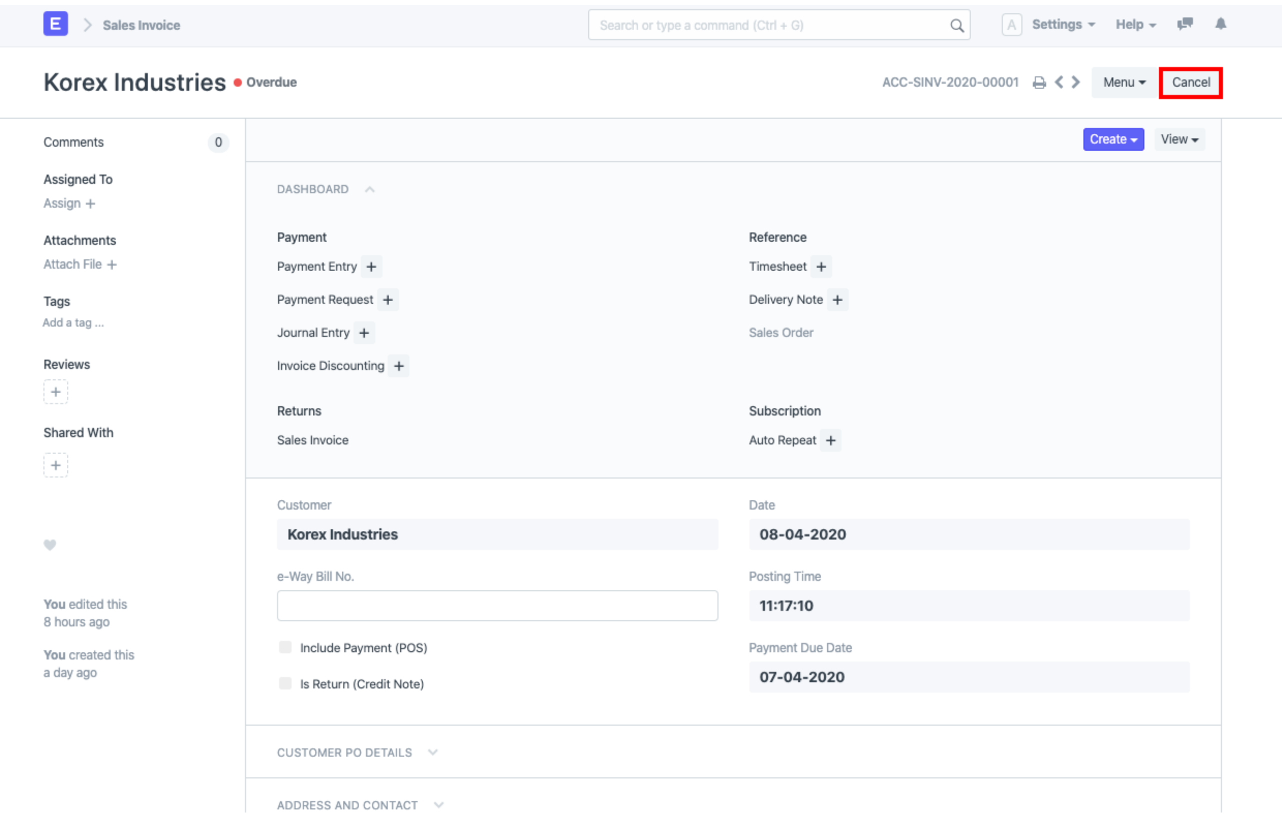
Note: If your document is linked with other documents, then you will need to cancel the dependant document before cancelling the parrent document. Example: If you have created Delivery Note and Sales Invoice against Sales Order, which you need to amend, then you should first Cancel Delivery Note and Sales Invoice made for that Sales Order. Then amend Sales Order, re-save and re-submit it.

➢ Delete Submitted Document

To delete a submitted document, you need to cancel it first. Following are the steps to delete a submitted document. These steps assume that you have the appropriate permissions on the document that you wish to cancel and delete.

Step 1: Cancel Submitted Document

You will find Cancel button on upper right corner of submitted document.

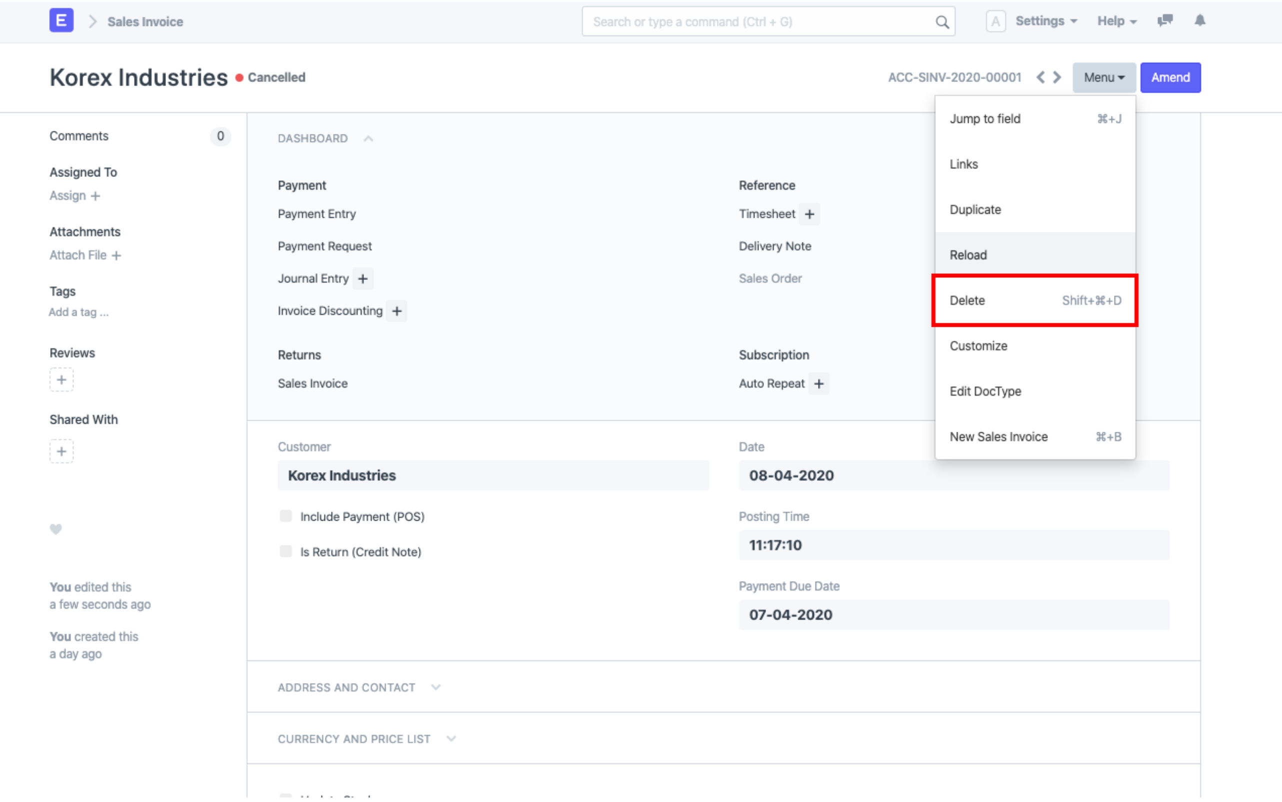


Step 2: Delete the document

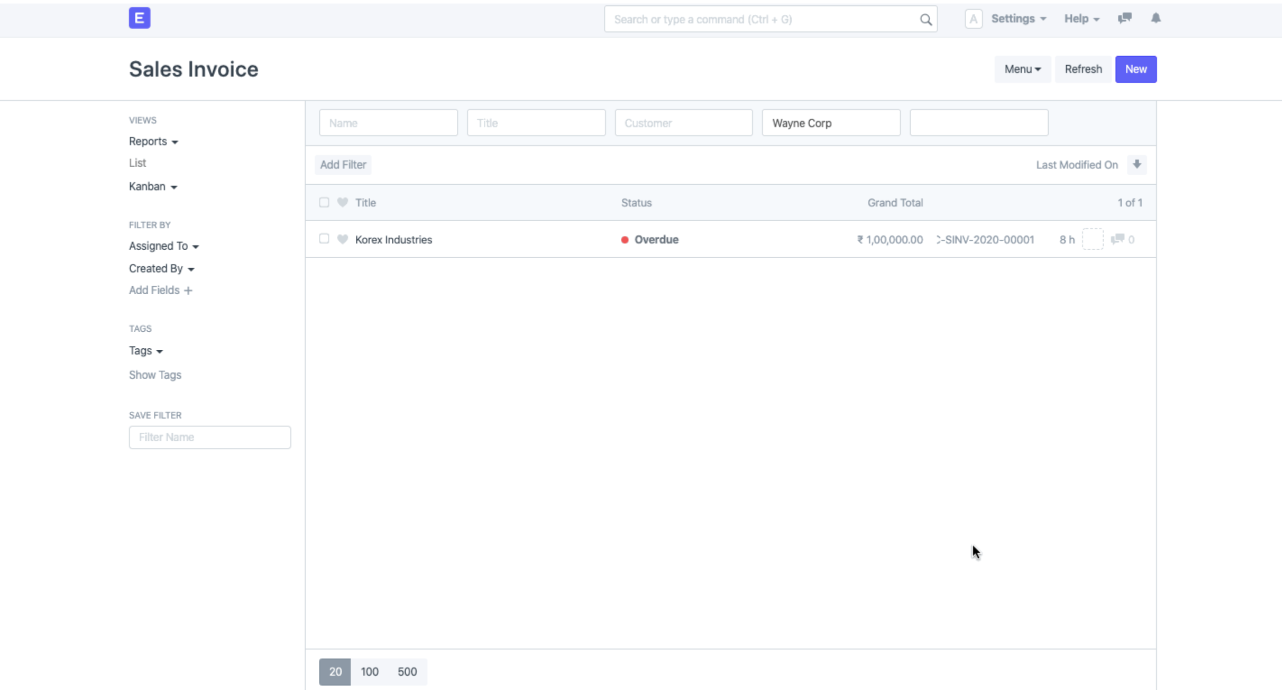
On cancellation of submitted document, Amend button becomes visible with the document status set to Cancelled. This means that the

document has been cancelled successfully.

To delete the document, now click on Menu, then Delete. This will delete the selected document.



Note: To delete multiple submitted documents in one go, you can select them in the list view and proceed to cancel and delete.



If your document is linked with other documents, then you will need to cancel dependent document before trying to delete the parent document.

Example: If you have created Delivery Note and Sales Invoice against Sales Order, which you need to amend, then you should first Cancel Delivery Note and Sales Invoice made for that Sales Order. Then amend Sales Order, re-save and re-submit it.

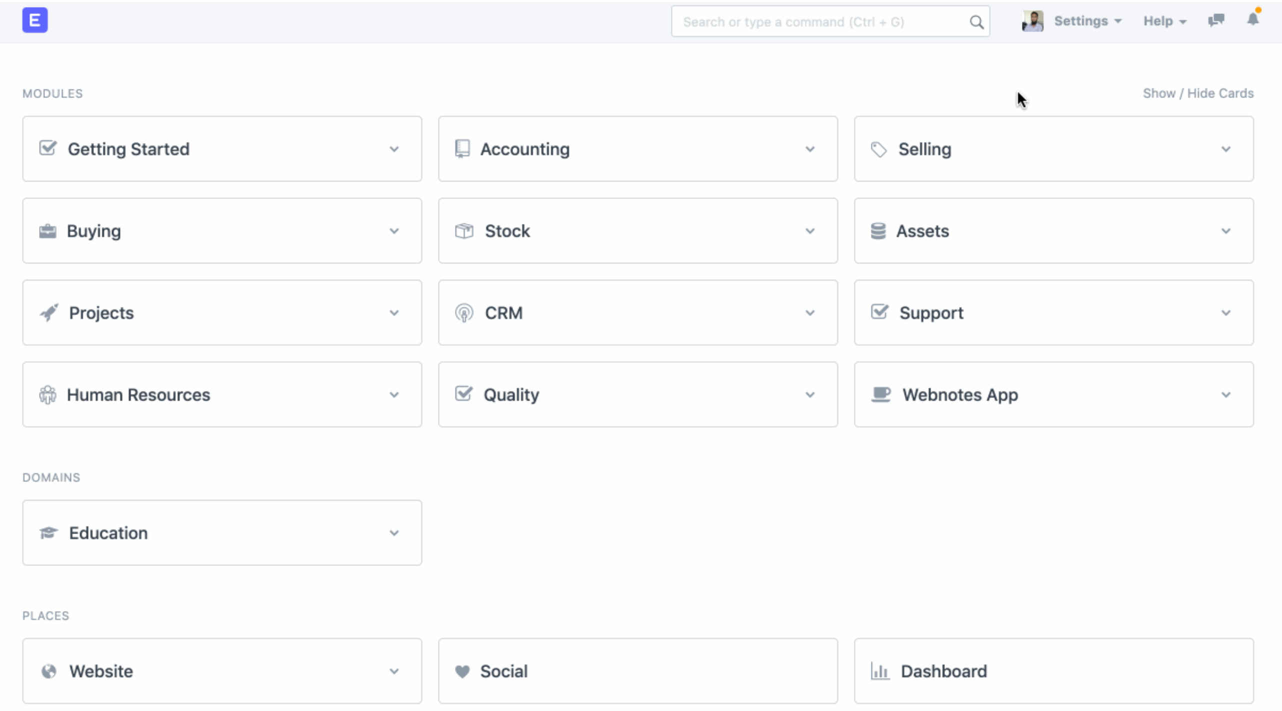
➢ Disable Notification Emails

Question:

We are receiving email Notification after creation of each document. Can we disable the Email Notification for Energy Points allocation?

Answer:

You can disable the notification for Energy Points and other features like Document Follow, Assignment and Mentions. Here is the help on how to disable the Notifications for the Energy Points and other features in specific.



➢ Set Current Value for Naming Series

Naming Series feature allows you to define prefix for naming of a documents. For example, if a Sales Order has prefix "SO", then the series will be generated as SO-00001, SO-00002... and so on. Click here to learn how you can customize Number Series for a transaction/master in ERP.

1. Setting the Current Value

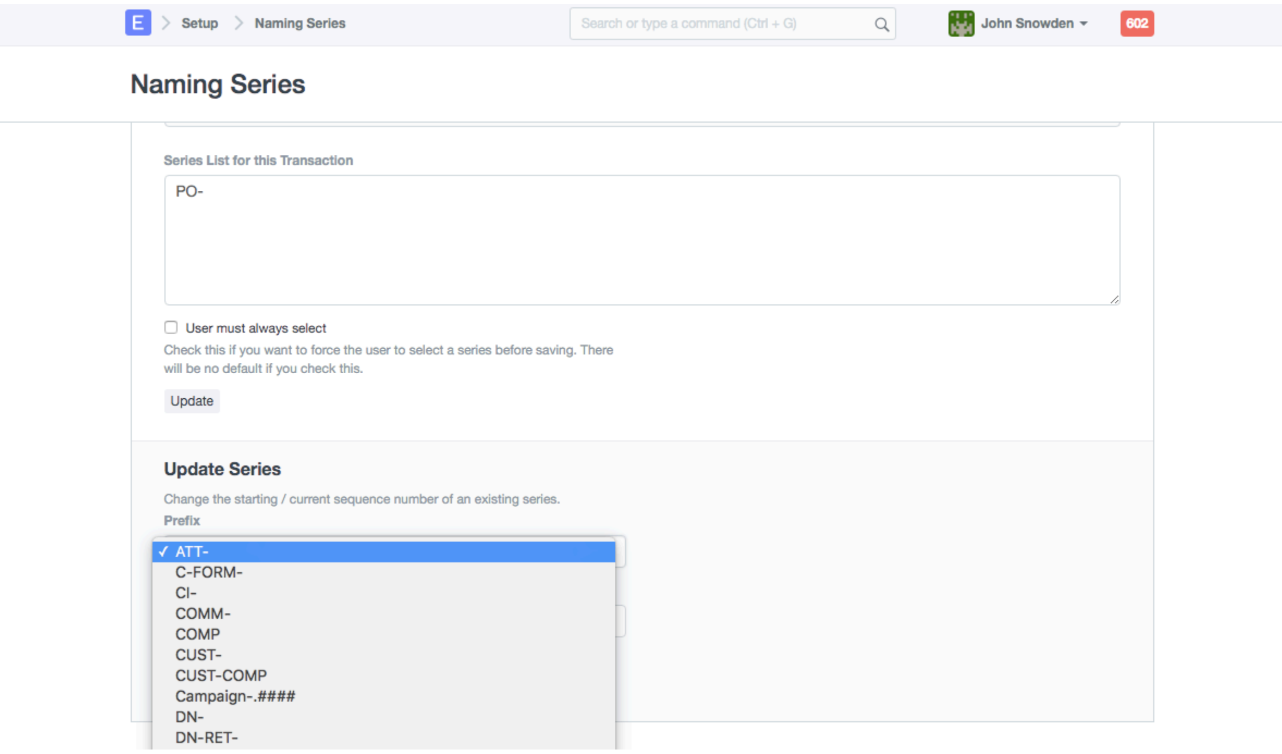
Naming Series feature also offers a tool where you can set Current Value for specific prefix. This is generally required if you have recently started using ERP, and have old transactions in the previous system, and you want the numbering series to start in from where it ended in the old system. Let's consider a scenario to learn this better.

For example, you have 322 Sales Orders created in your old system with SO00322 as highest Sales Order Id. In ERP, you need the first Sales Order to pick up #323 when it is saved. To enable this, you should set Current Value for SO series in following steps.

Go to Naming Series Tool

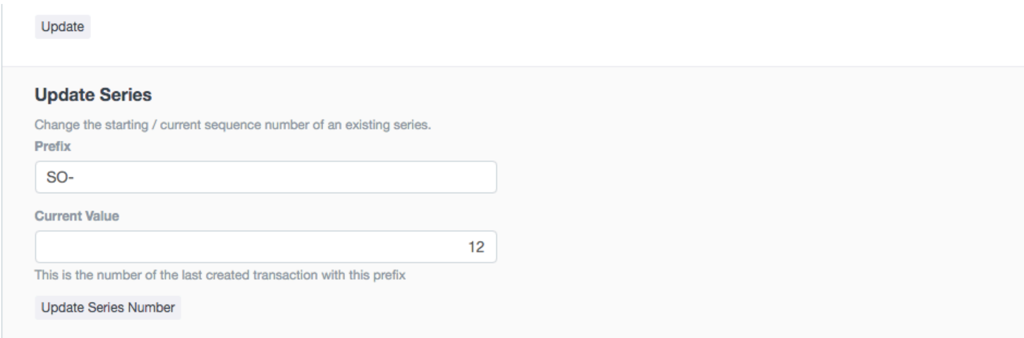
Setup > System > Naming Series

Update Series Section



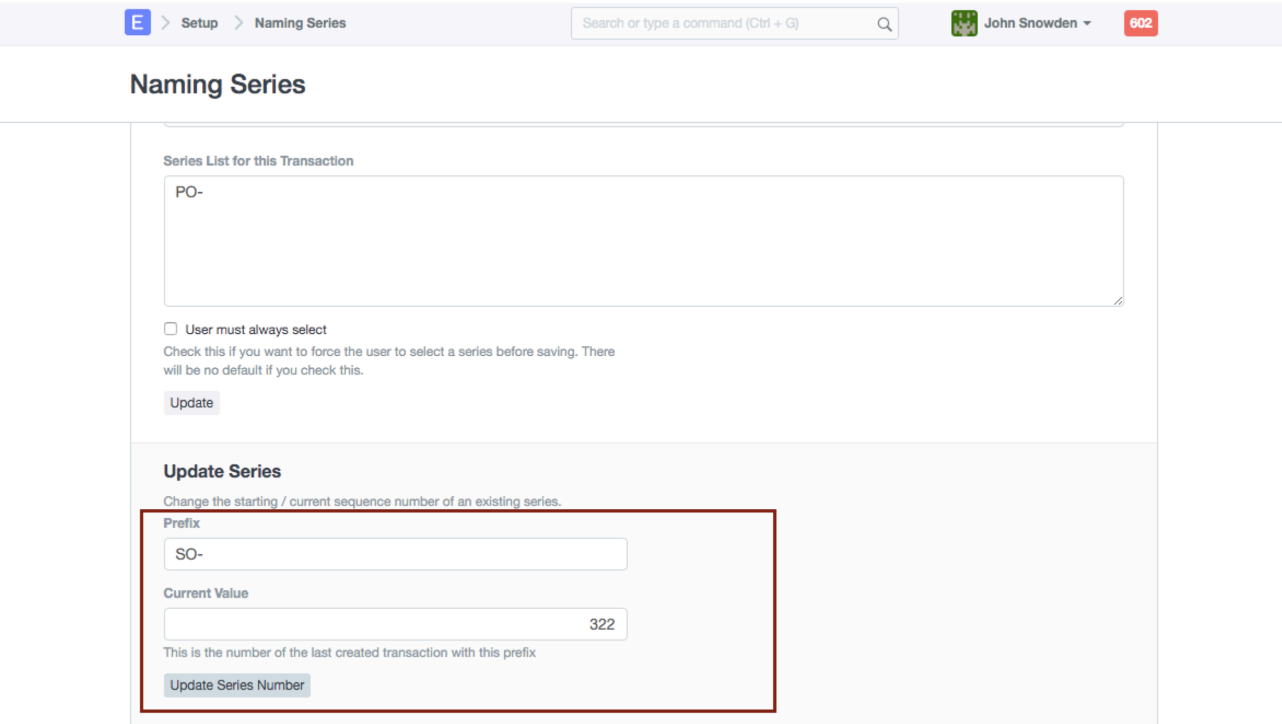
Select Prefix

Considering our scenario, prefix for Sales Order will be "SO".



Current Value

If you have currently 12 Sales Orders created in your account, then current value updated will be 12. You can edit Current Value to 322, and then click on Update Series Number.



With this setting, you will have numbering for the New Sales Orders starting with #323.

2. Error Due Series Number

If you receive a Duplicate Name error while saving a transaction, for example, while saving Item Price, you receive an error saying:

Duplicate name Item Price RFD/00016

This error message indicates that when you are saving Item Price, system is trying to allocate "RFD/00016" to that Item Price record. But it is finding that Item Price with this ID is already existing in your system.

This error could arise because Current Value for Series/Prefix of Item Price is disturbed and not in sync with actual Current Value. While actual Current Value for Item Price could be 20 (or any number more than 16), someone has set Current Value for this series as 15.

To confirm actual Current Value for particular Series, you should check report for document in question (Item Price in this case), and check for the Item Price ID with highest value.

Let's assume we find that actual Current Value for Item price is 22, then you go Naming Series, and set Current Value for the Prefix/Series of Item Price to 22, and Update Series Number.

These instructions is applicable for all the documents in ERP for which user can customize Series and its Current Value.

Let's consider another scenario to learn this better. On assigning a document to another user, error message says:

Duplicate name ToDo TDI00014286

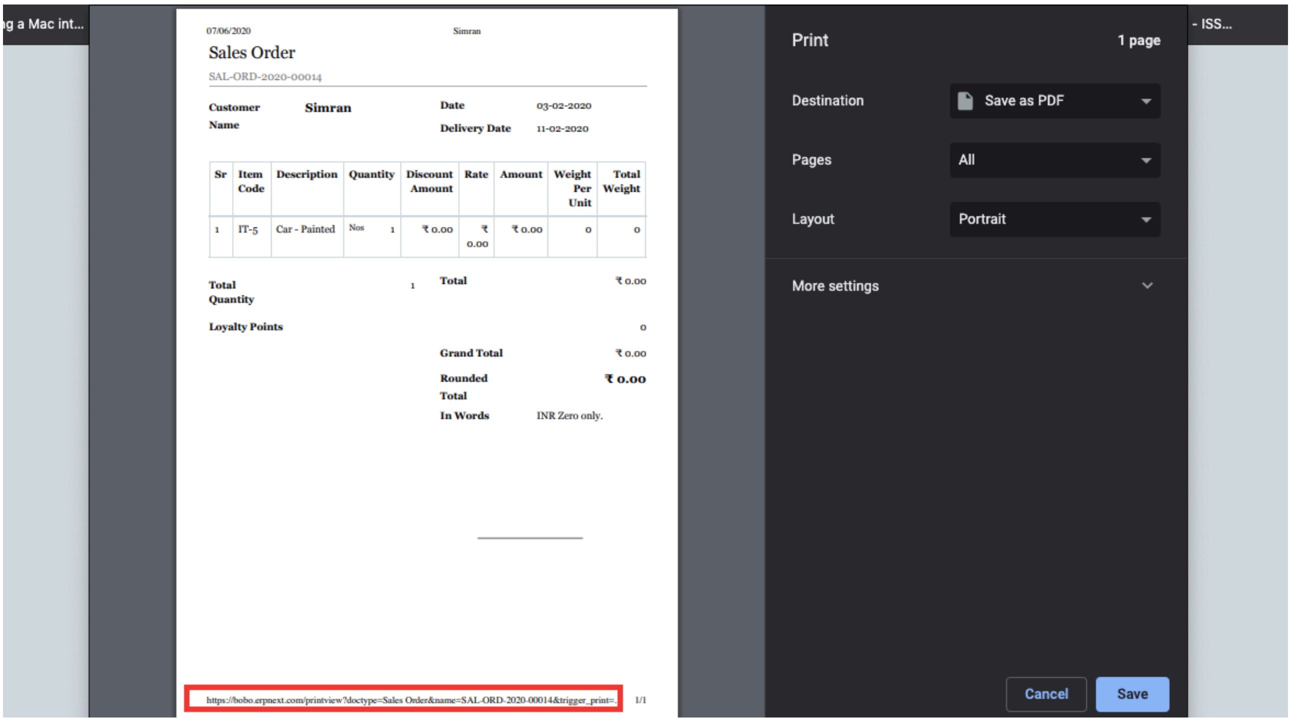
This indicate the Current Value for Series/Prefix of ToDo (TDI) has been disturbed. You should follow these steps to correct value for Current Value for TDI prefix.

1. Check ToDo report for the highest ToDo id value.
2. Setup >> Settings >> Naming Series
3. Check section B of Update Series
4. Select Prefix for ToDo "TDI"
5. Ensure that highest number for ToDo is updated as Current Value in Naming Series. If not, correct Current Value, and click on "Update Series Numbering".

➢ Remove Link at the Bottom of the Print Page

Question:

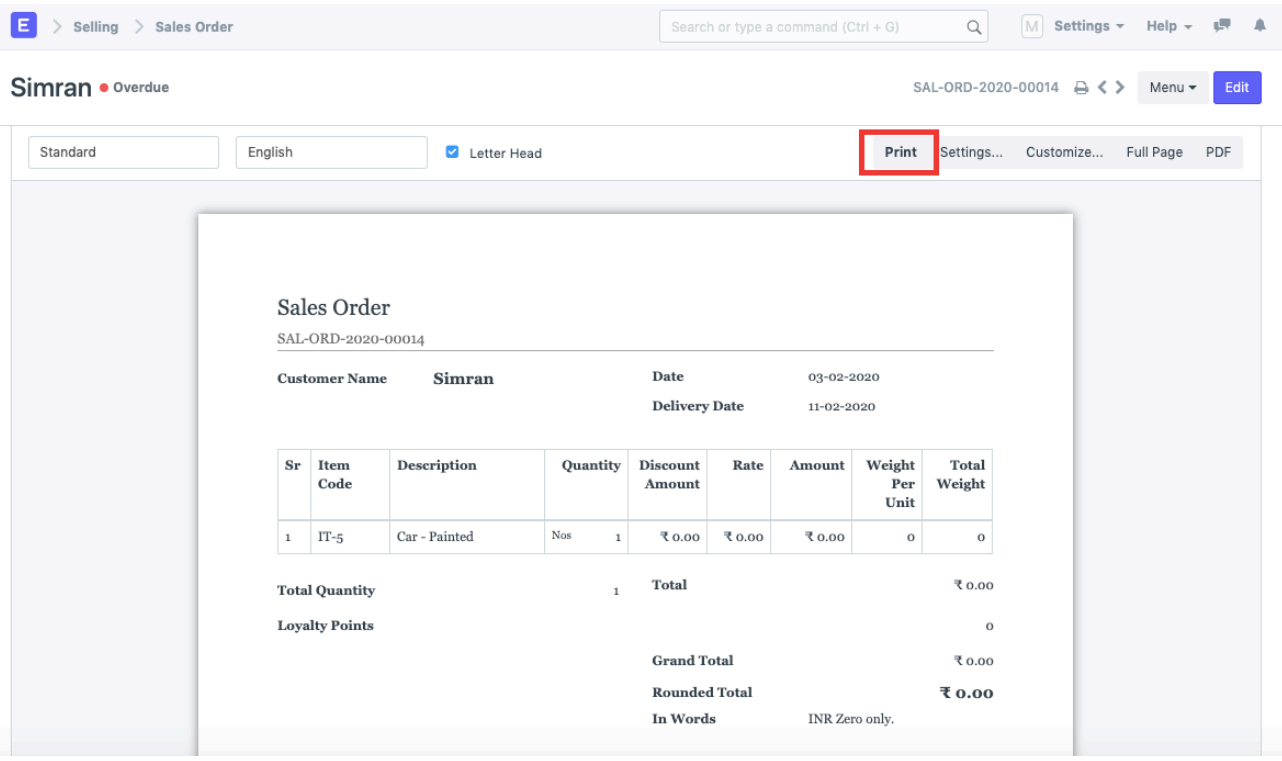
How to remove the ERP link at the bottom of the page while printing it?



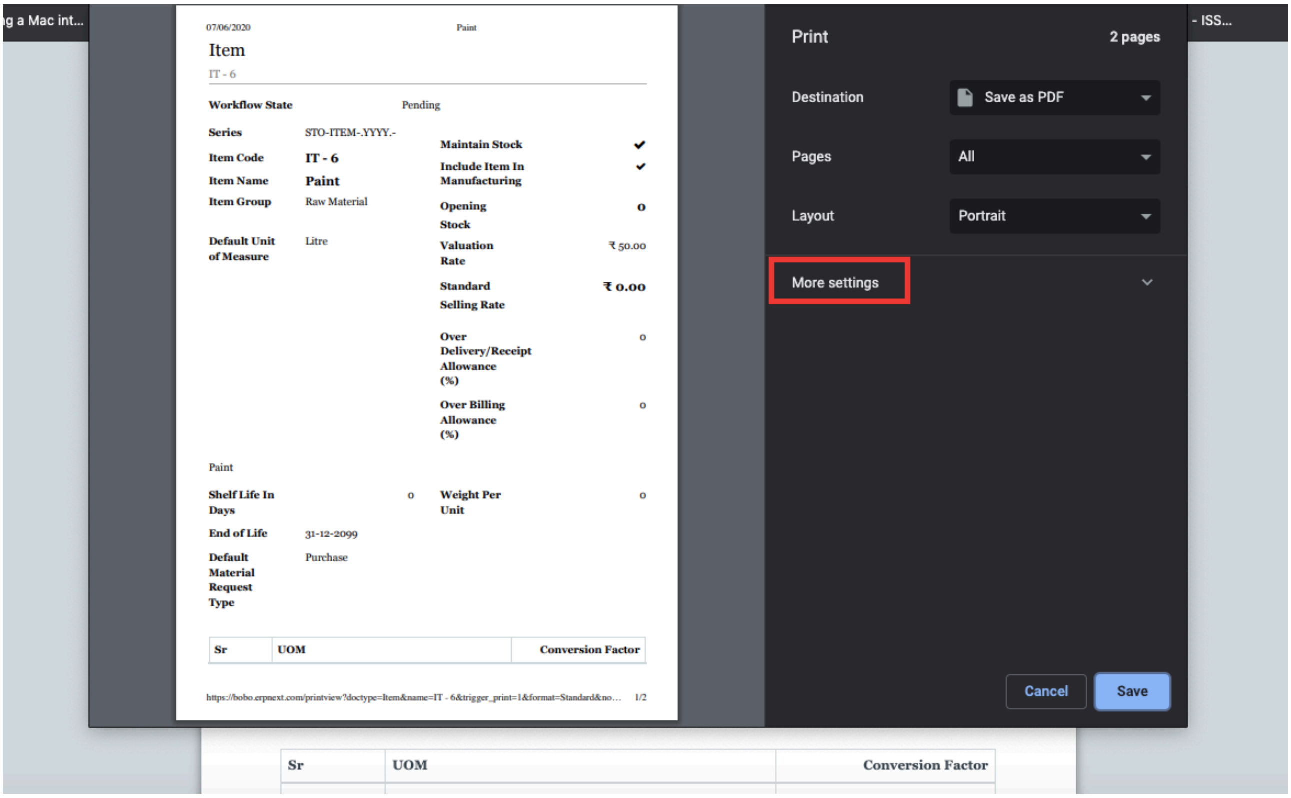
Solution:

To remove the url at the bottom of the print page, following the below steps:

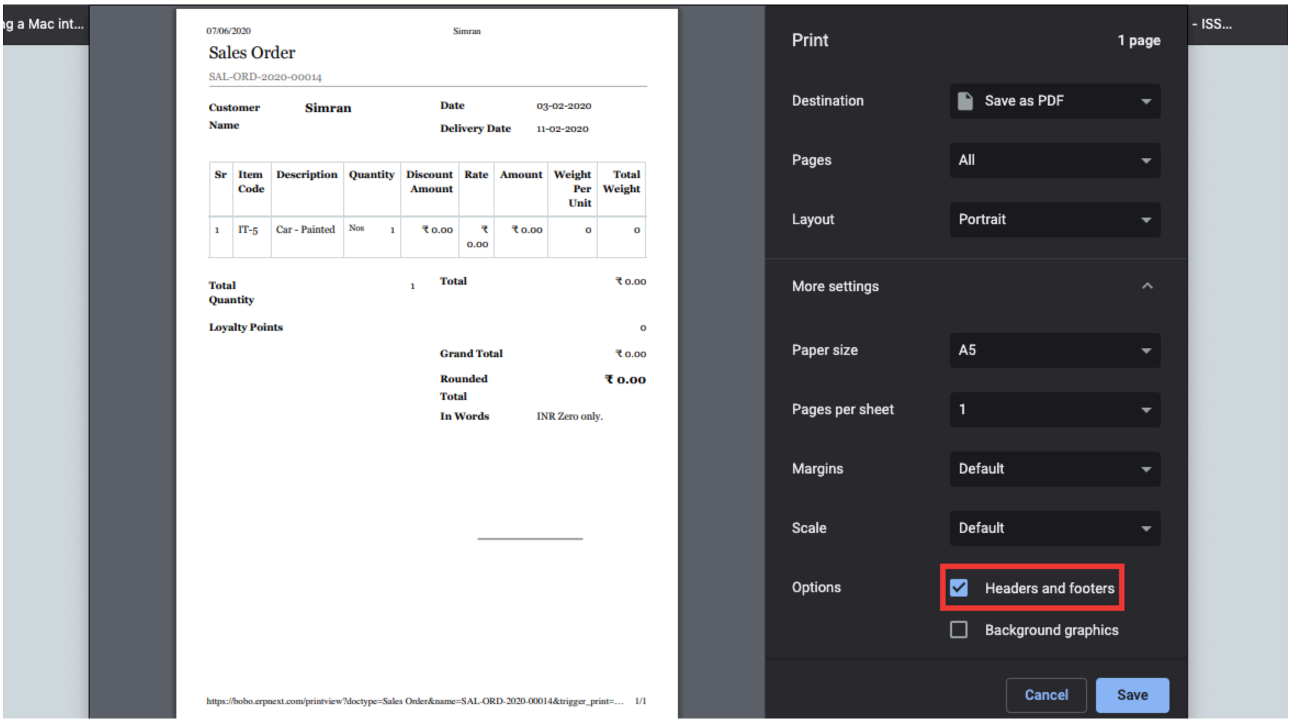
1) Click on the Print button.



2) Click on "More Settings"



3) Uncheck the "Headers and Footers" checkbox.

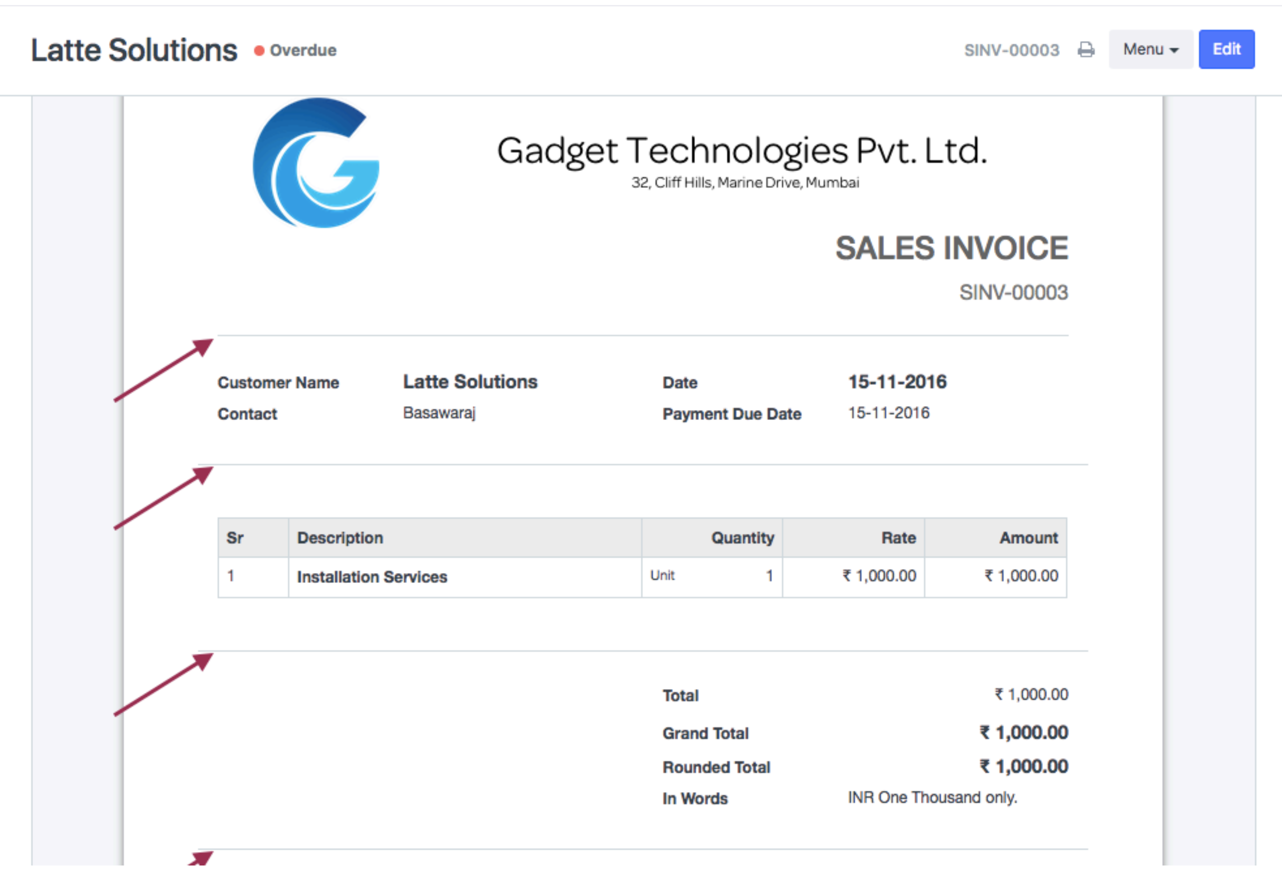


4) Click on Save.

➢ Remove Line Breaks in Print Formats

Question:

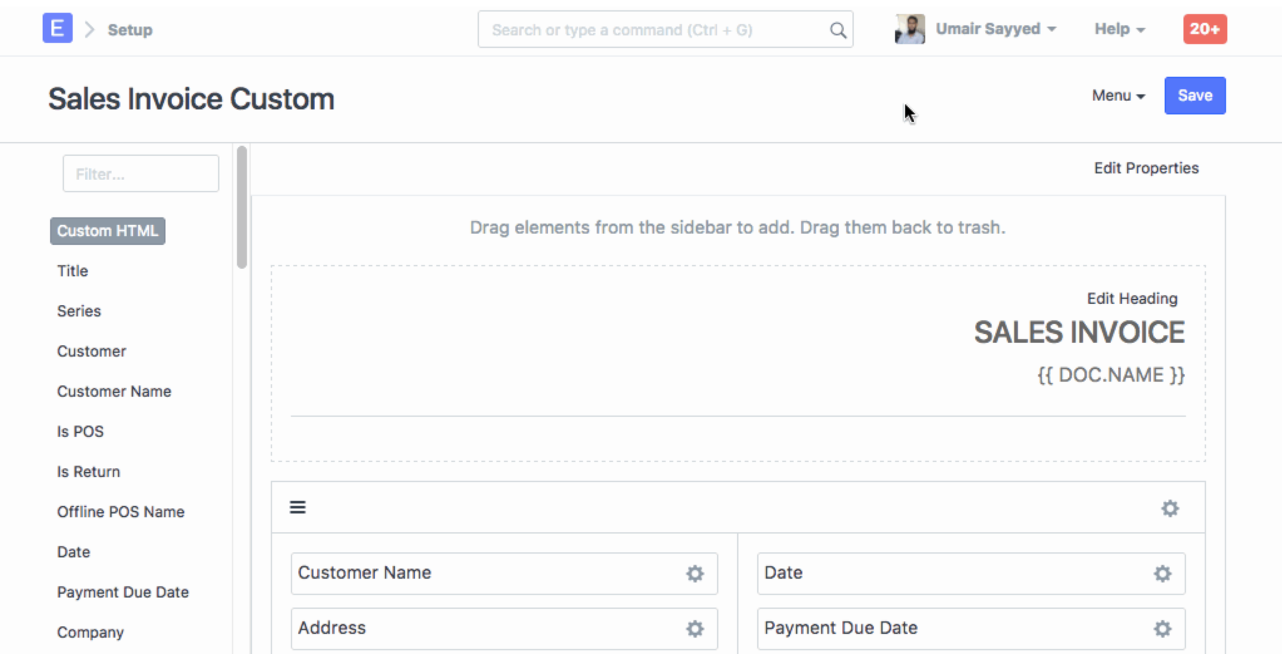
In the Print Format, I am getting link breaks for each section. How can I disable it?



Answer:

To disable line breaks for the section breaks, you should uncheck field "Show Line Breaks after Sections" in its Print Format.

Print Format Builder > Select Print Format > Edit Settings > Uncheck field "Show Line Breaks after Sections"



➤ Easy steps to setup Workflow

When a company has multiple levels of approval for a document, a Workflow can be set.

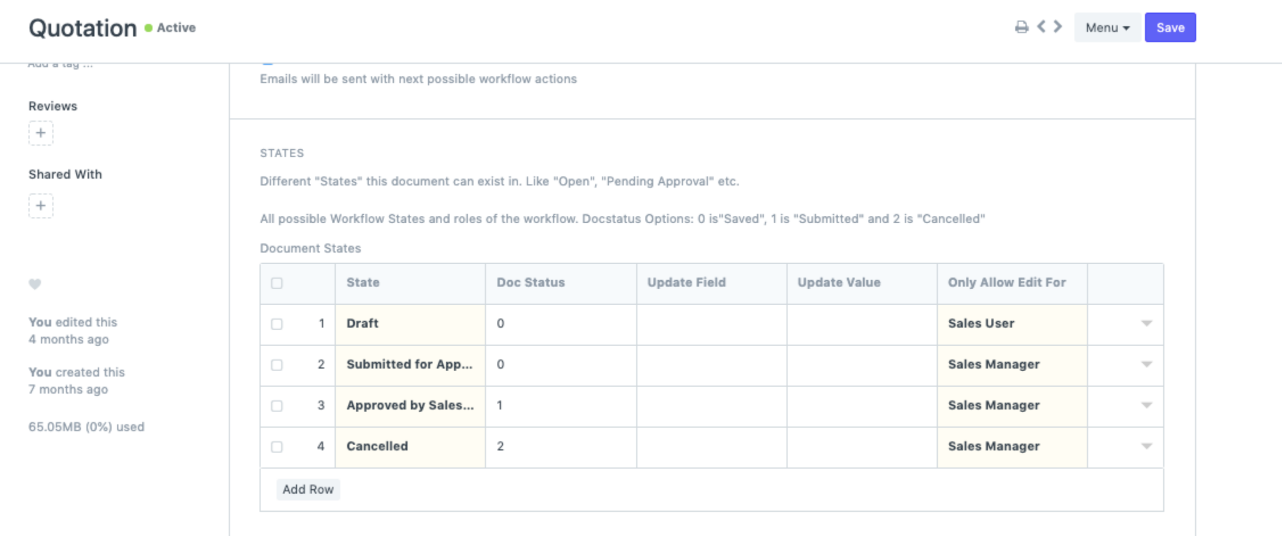
In ERP, you can go to Workflow list --> Create New --> Name the workflow and define :

1. States

2. Transition rules.

1. States :

When a document is passed on for different levels of approval, there are states defined at each level for the role of the user.


Quotation • Active

Menu Save

Emails will be sent with next possible workflow actions

Reviews

Shared With

You edited this 4 months ago

You created this 7 months ago

65.05MB (0%) used

STATES

Different "States" this document can exist in. Like "Open", "Pending Approval" etc.

All possible Workflow States and roles of the workflow. Docstatus Options: 0 is"Saved", 1 is "Submitted" and 2 is "Cancelled"

Document States

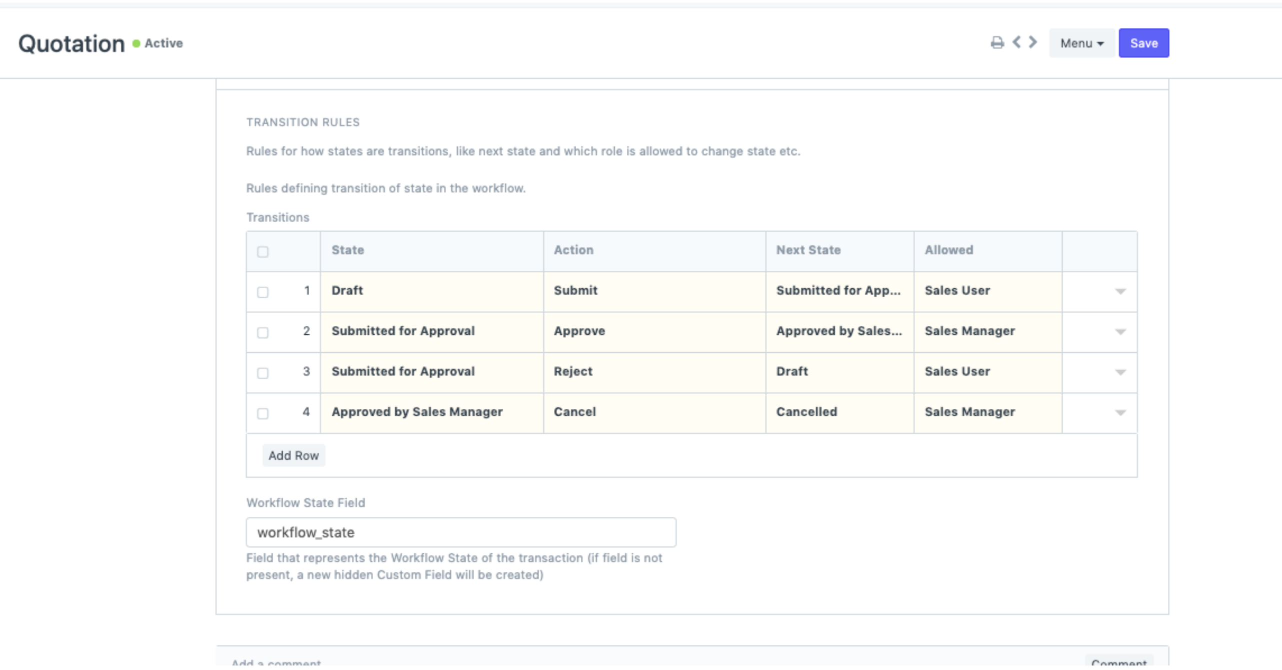
	State	Doc Status	Update Field	Update Value	Only Allow Edit For
1	Draft	0			Sales User
2	Submitted for App...	0			Sales Manager
3	Approved by Sales...	1			Sales Manager
4	Cancelled	2			Sales Manager

Add Row

1. Transition Rules :

For instance: A **Sales user** is only allowed to create a **Quotation** and it can be saved in the **Draft** state.

Further, it can be sent to the **Sales Manager** for approval and the User with this role can have the permission to either **Approve** or **Reject** the Quotation after which it can either be sent to the **Draft** State if **Rejected** or final **Approved** State.


Quotation • Active

Menu Save

TRANSITION RULES

Rules for how states are transitions, like next state and which role is allowed to change state etc.

Rules defining transition of state in the workflow.

Transitions

	State	Action	Next State	Allowed
1	Draft	Submit	Submitted for App...	Sales User
2	Submitted for Approval	Approve	Approved by Sales...	Sales Manager
3	Submitted for Approval	Reject	Draft	Sales User
4	Approved by Sales Manager	Cancel	Cancelled	Sales Manager

Add Row

Workflow State Field

workflow_state

Field that represents the Workflow State of the transaction (if field is not present, a new hidden Custom Field will be created)

Error Messages:

A document cannot be Cancelled before it is Submitted.

[This is a typical error faced by users who define the state of the Document cancelled before Submitting it. Doc Status 1 defines that the Document will be Submitted at that State, thus the State with Doc status 2 should only be defined in the Transition after the State with Doc status 1.]

Setup a Simple Workflow to begin with and let us know what you think more on Workflows! We love to see our Users Happy!! ;)

ARTICLE-USERS AND PERMISSIONS

➢ Difference Between System User and Website User

Question: I have added my Employee as a User and have assigned them Roles as well. Still, they are not able to view Dashboard on the login.

Answer:

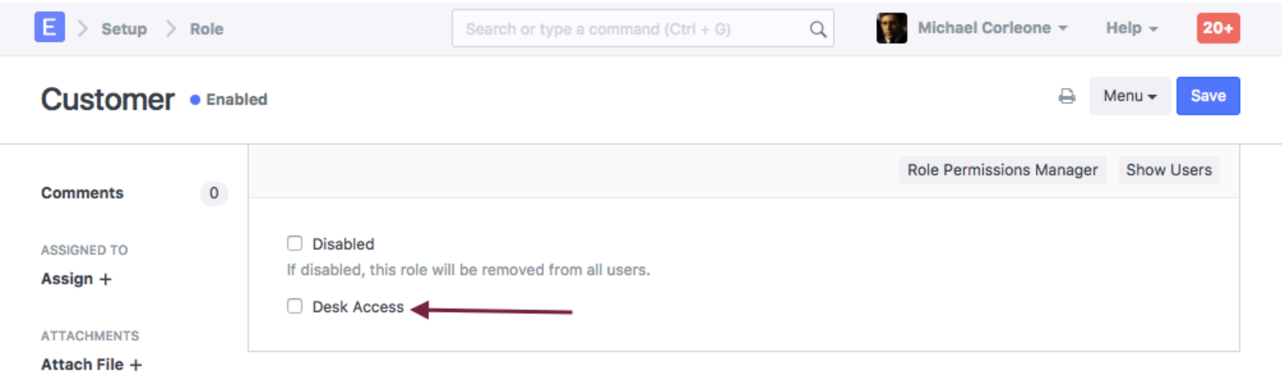
There are two type of Users in ERP.

- **System User**: They are Employees of your company. Example of Roles assigned to System Users are Account User, Sales Manager, Purchase User, Support Team etc.
- **Website User**: They are to parties (like Customer and Suppliers) of your Company.

Example Website User Roles are Customer and Suppliers.

How to check if Role is for System User or Website User?

In the Role master, if field "Desk Access" is checked, that Role is for System User. If Desk Access field is unchecked, then that Role is for Website User.

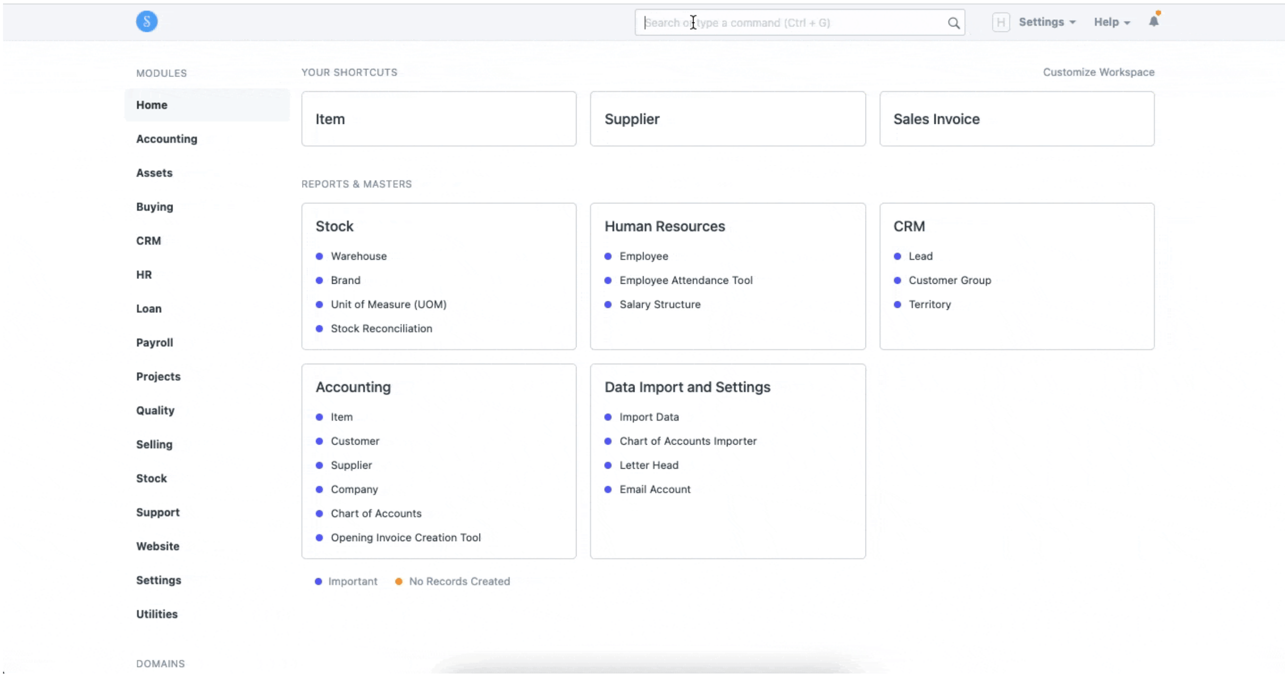


➢ Change existing user's email ID

To change a User's Email Id, follow the steps:

User List -> Open the User *(the one which requires the change)* **-> Click on Menu -> Rename -> Enter the New Email Id and Save it.**

Refer to the GIF here illustrating the same:



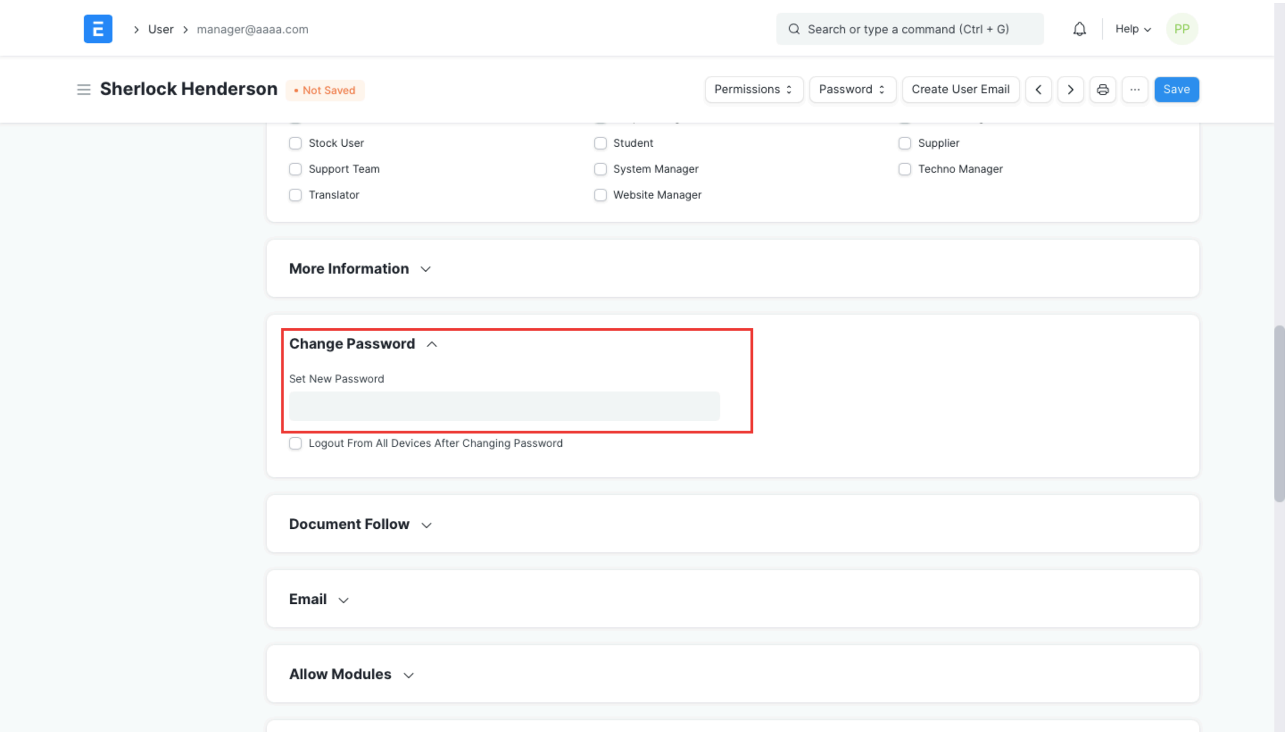
➢ Change User Password

Each ERP user can customize password for his/her ERP account. Also user with System Manager role will be able to reset password for himself as well as for other users. Following are the steps to go about changing your password.

1) Go to User list

2) Open the user for whom you wish to change the password

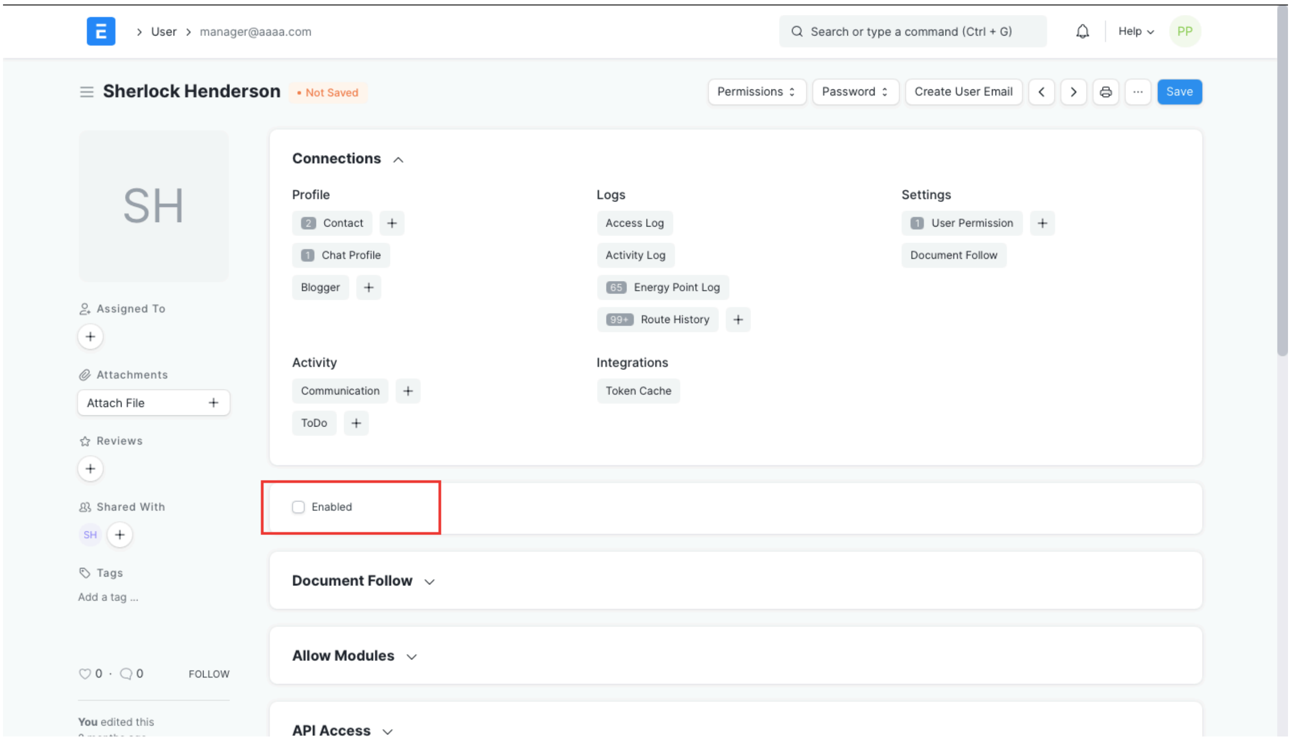
3) Go to 'Change Password' section, enter the new password and save the form to save the changes



➢ Disable any user

To disable an ERP user who has left your company from accessing the system, follow the below given steps.

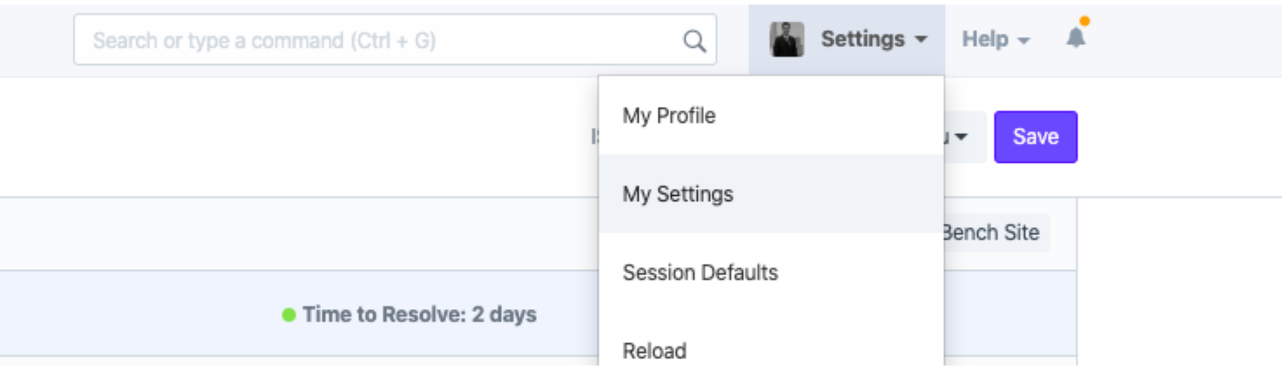
1. Type 'User List' in the awesome bar or search bar
2. Select the user you want to disable
3. Uncheck the 'Enabled' checkbox for the selected user
4. Save your changes



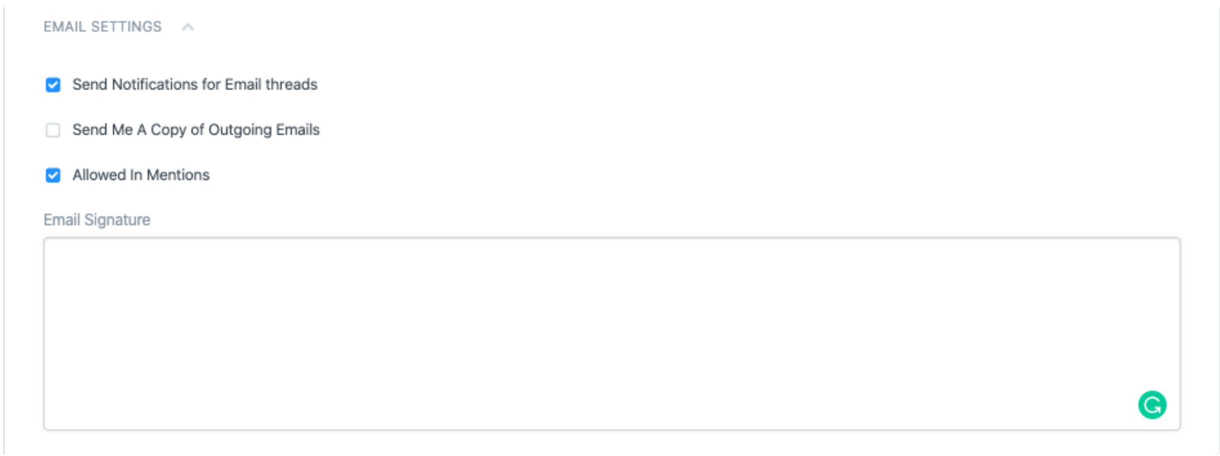
➢ Setting Up Email Signature in ERP

Q. How do I add my Email Signature in ERP?

To add your signature, go to your User Profile under **Settings > My Settings**



Scroll down to the **Email Settings** section where you can add your signature in HTML:



➢ User Restriction

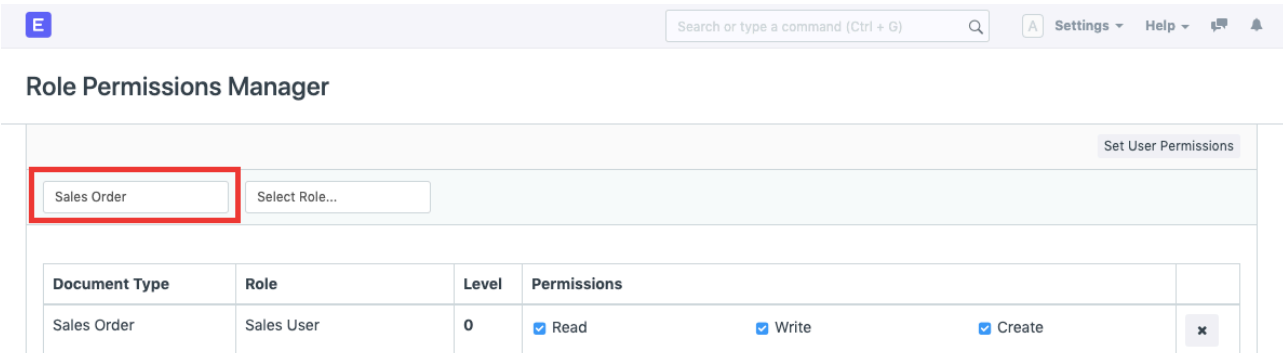
Following are the steps to restrict User to a document based on Owner/creator.

Step 1: Role Permission Manager

Home > Users and Permissions > Permissions > Role Permissions Manager

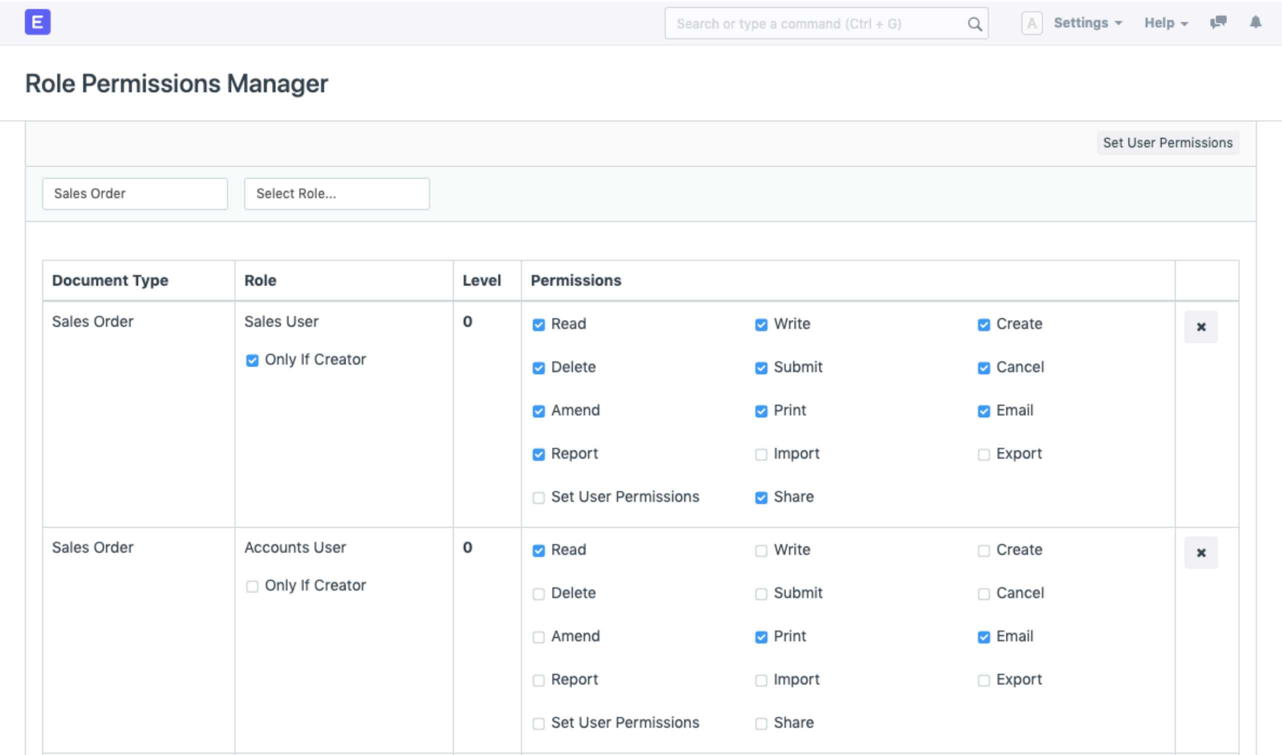
Step 2: Select Document Type

Select Document Type for which you want to set user permission. After permissions are loaded for selected document, scroll to role for which you want to set restriction.



Step 3: Apply User Permission

For Role to be restricted (Sales User in this case), check "Only If Creator".

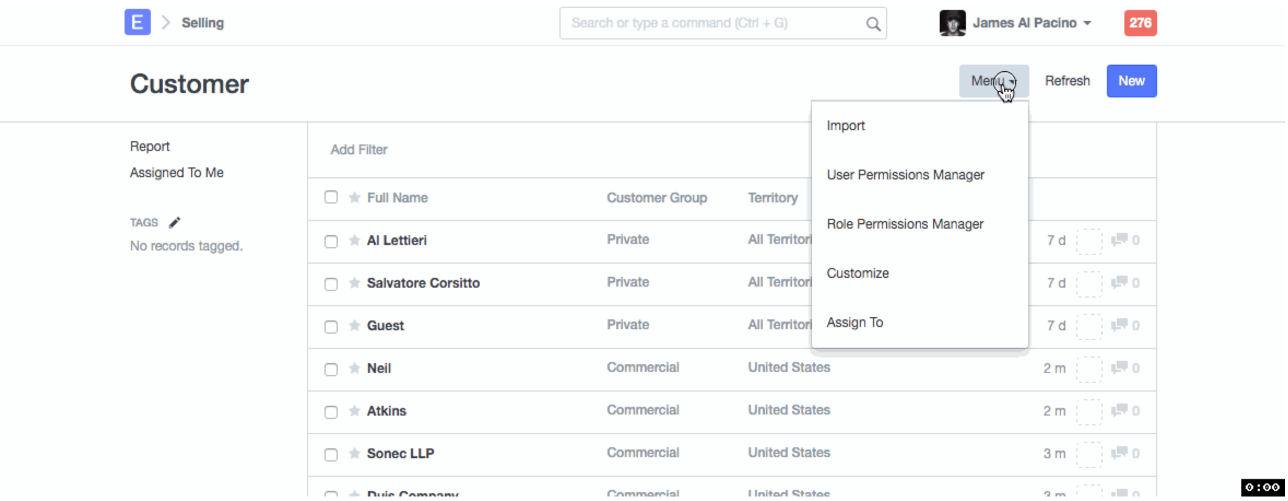


➢ Managing Perm Level in Permission Manager

Perm Level is way of reducing the amount information visible or changeable in a specific DocType for certain User Groups. Where as you can define visibility or changability for each DocType by customizing the DocType-specific Permissions Rule, with the Perm Level you can change these for specific Sections or Fields.

In each document, you can group fields by "levels". Each group of fields or field group is denoted by a unique number (0, 1, 2, 3 etc.). A separate set of permission rules can be applied to each field group. By default all fields are of level 0.

Perm Level (Abbreviated form of Permission Level) for a field can be defined in the Customize Form.

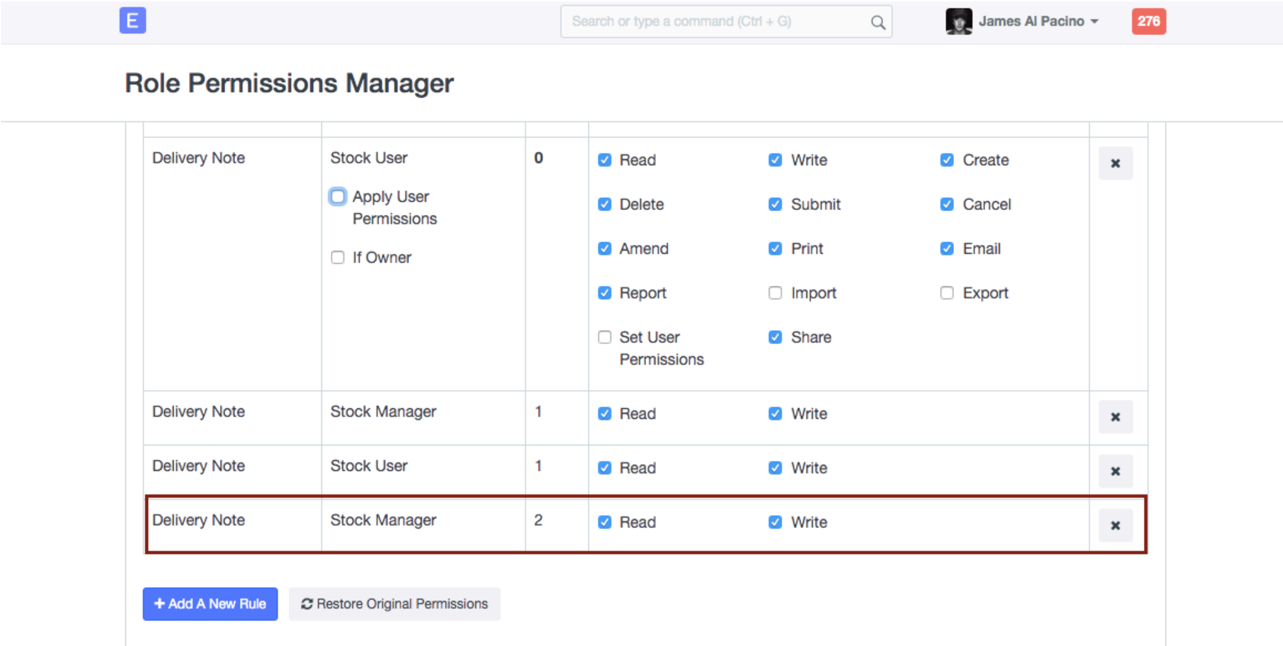


If you need to assign different permission of particular field to different users, you can achieve it via Perm Level. Let's consider an example for better understanding.

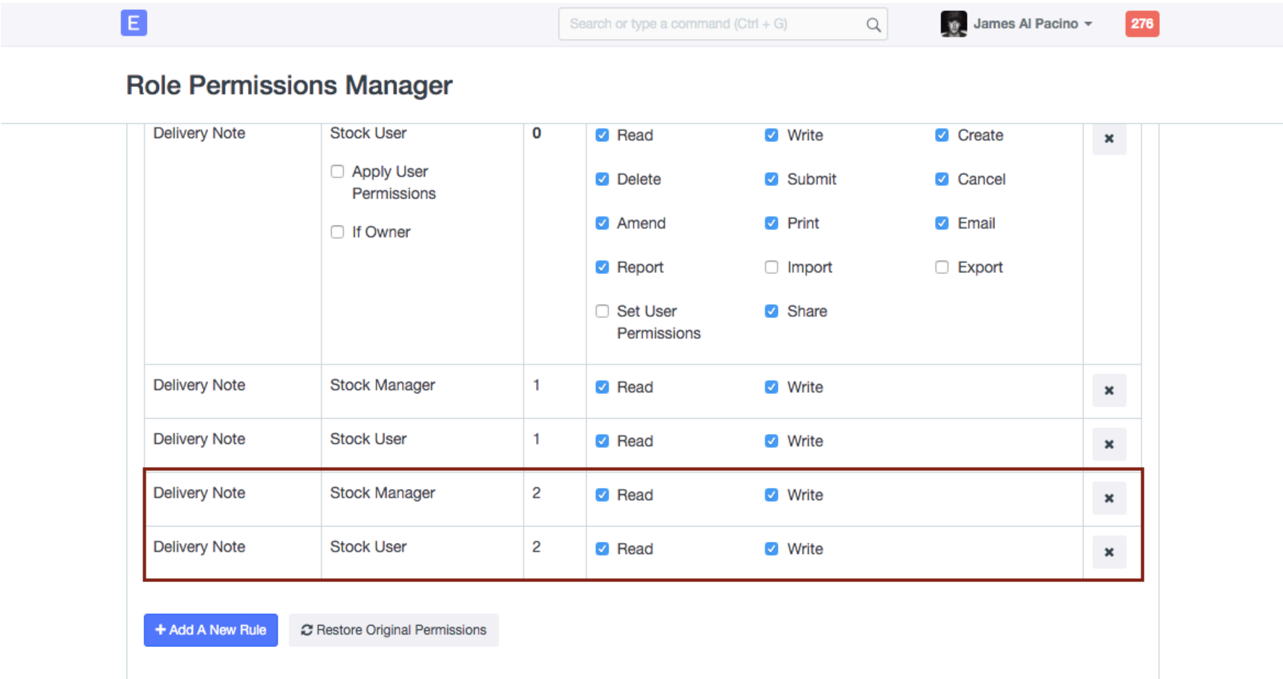
Delivery Note is accessible to Stock Manager as well as Stock User. You don't wish Stock User to access Amount related field in Delivery Note, but other field should be visible just like it is visible Stock Manager.

For all related fields, that should not be seen, you can set Perm Level as (say) 2.

For Stock Managers, they will have permission on fields on Delivery Note with Perm Level 2, whereas a Stock User will not have any permission on Perm Level 2 for Delivery Note, because their role has not been assigned with a rule allowing them to read or write in Field with Perm Level of 2, as shown below.



Considering the same scenario, if you want a Stock User to access a field at Perm Level 2, but do not want to give permission to edit it, the Stock User will be assigned with permission to only be able to read on Perm Level 2, but not to write/edit.



Perm Levels (1, 2, 3 or 2, 1, 3 or 3,2,1) do not need to be in any particular order. They do not imply hierarchy. Perm Level is primarily used for grouping number of fields together, and then assigning permission to Roles for that group. Hence, you can set any perm level for an item, and then do permission setting for it.

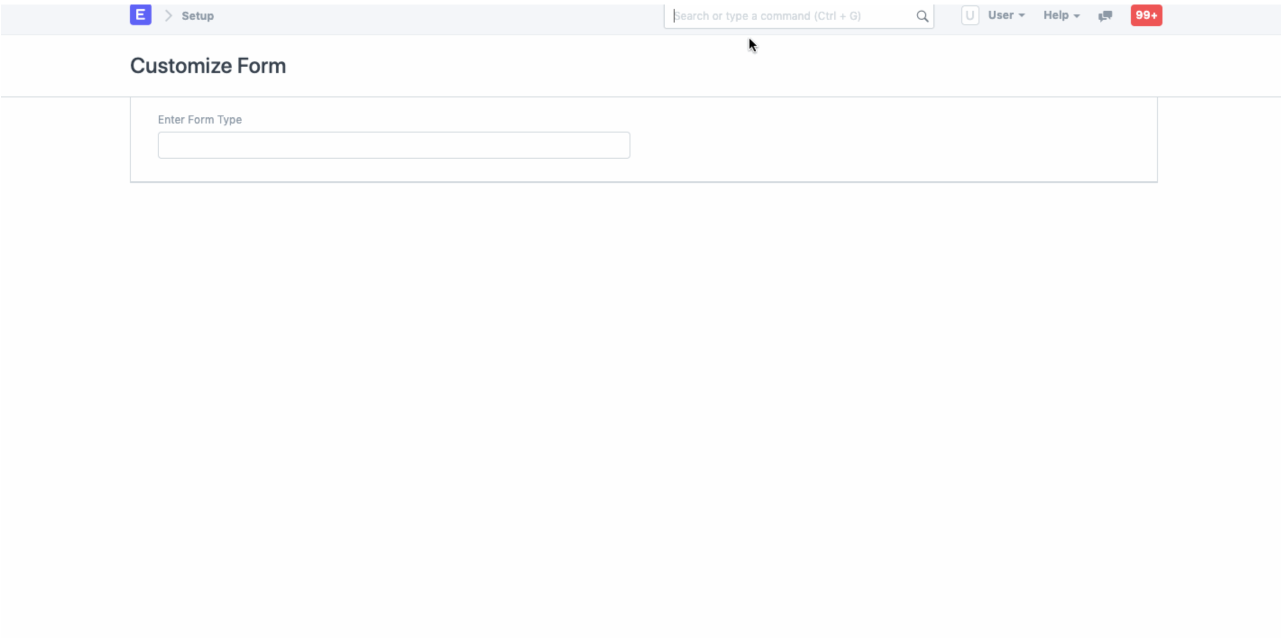
If you want to change permissions for all fields in a section, you can simply change the perm level for the section field and it will be applied to all fields in the section.

➢ Field Level Permission Management

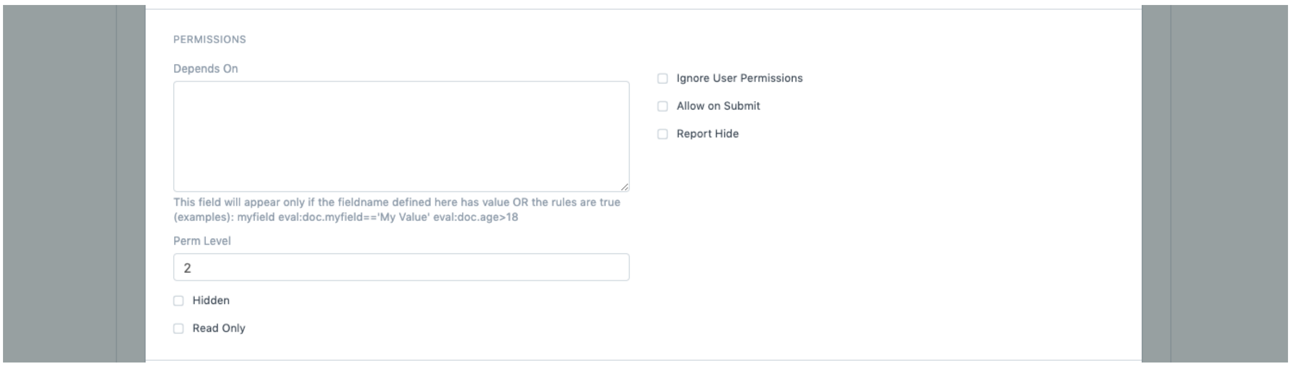
Restricting a field based on Roles can be easily configured using Perm Level, which is required by most organizations. To define a **Perm Level**, you can go to the respective form and Customize it.

Let's take a scenario where the organization doesn't want its Employee (Accounts User) to edit the Rate of the item while creating a **Sales Invoice**. To do that, we can simply make the **Item Rate** field a *read-only*.

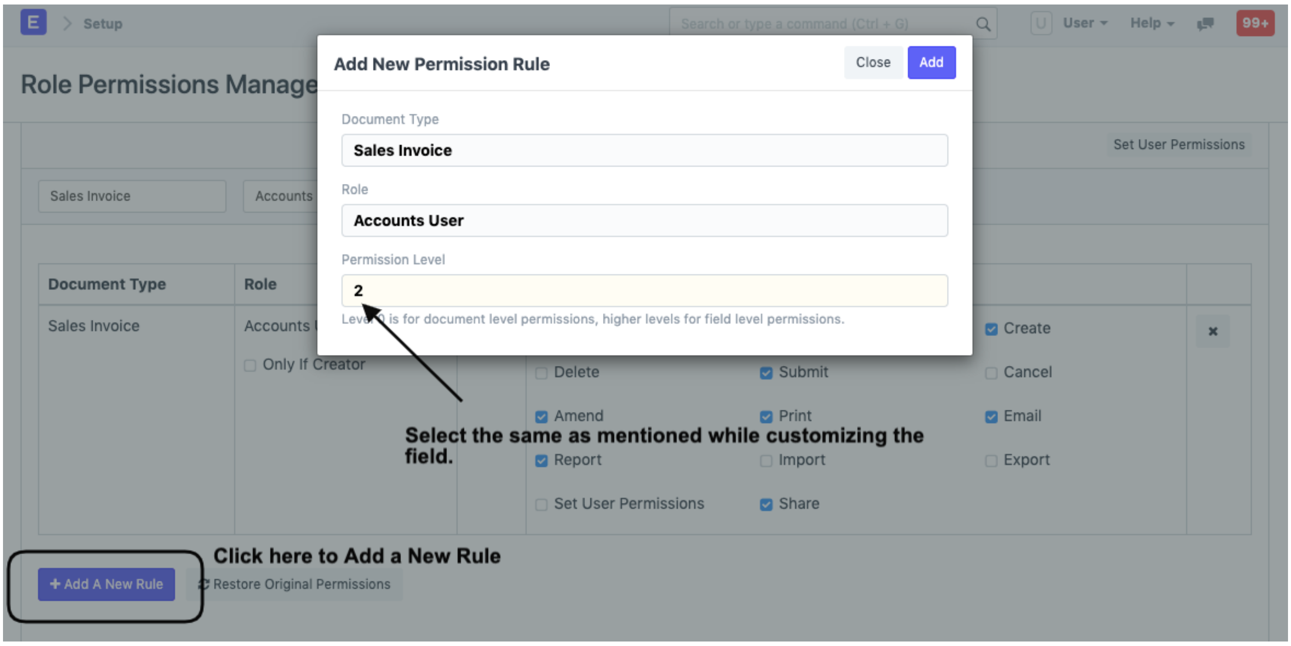
1. To achieve this, go to **Customize Form**, select DocType as **Sales Invoice Item**, scroll to the **Item Rate** field and expand it.



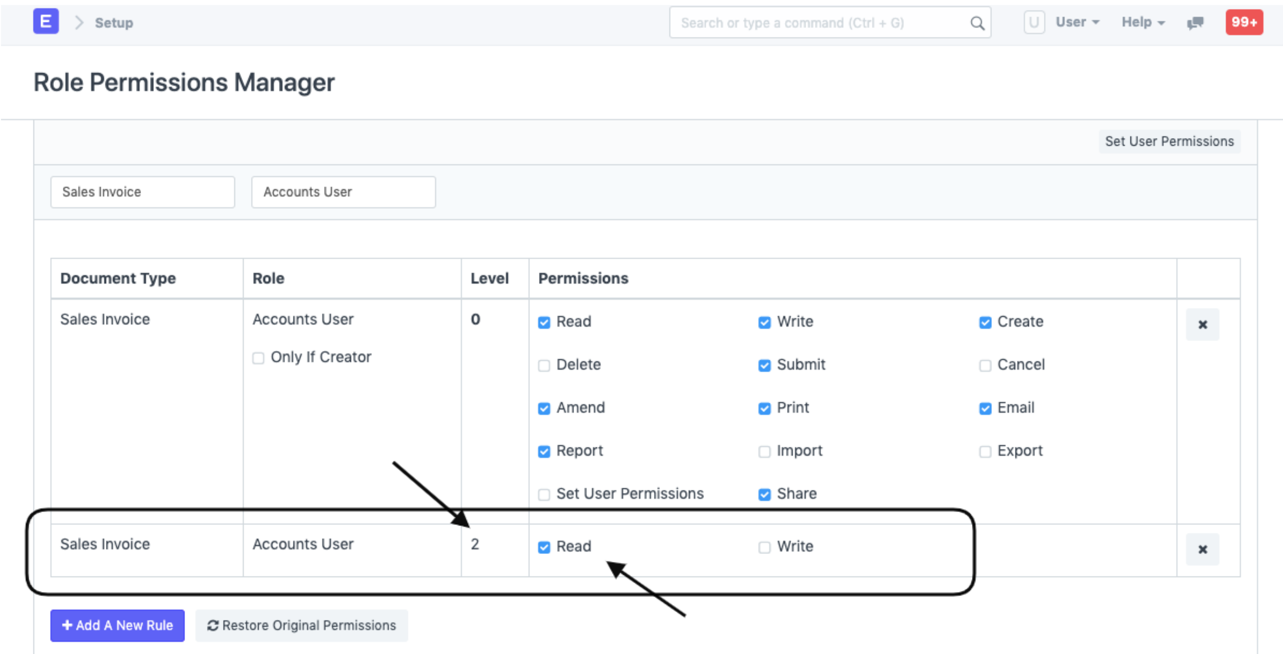
2. Search for the **Perm Level**, enter the number (0, 1, 2, 3, etc), and *Save* it.



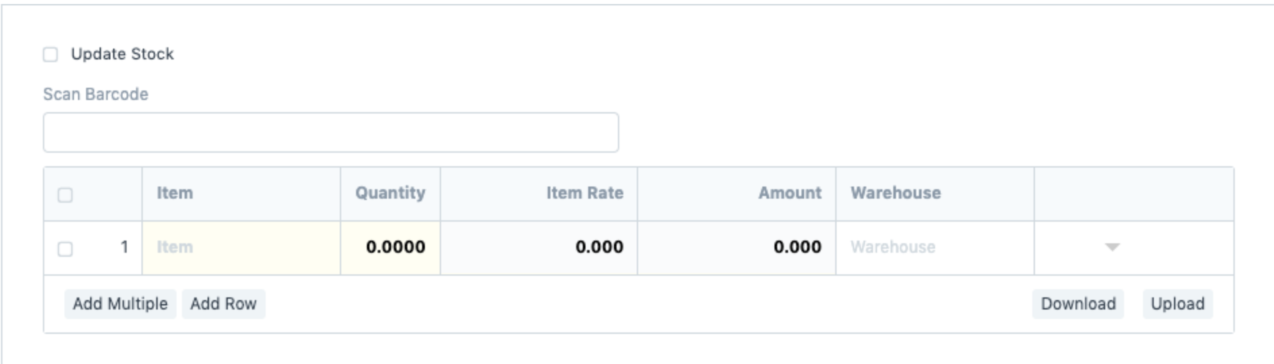
3. Once saved, click on **Add a New Rule** in Role Permission Manager and select the Document Type and the Role, in our case, *Accounts User*, set the Perm Level as 2 and grant the Employee Read access.



This is how the Role Permissions Manager will display the newly created Rule with Perm Level as 2:



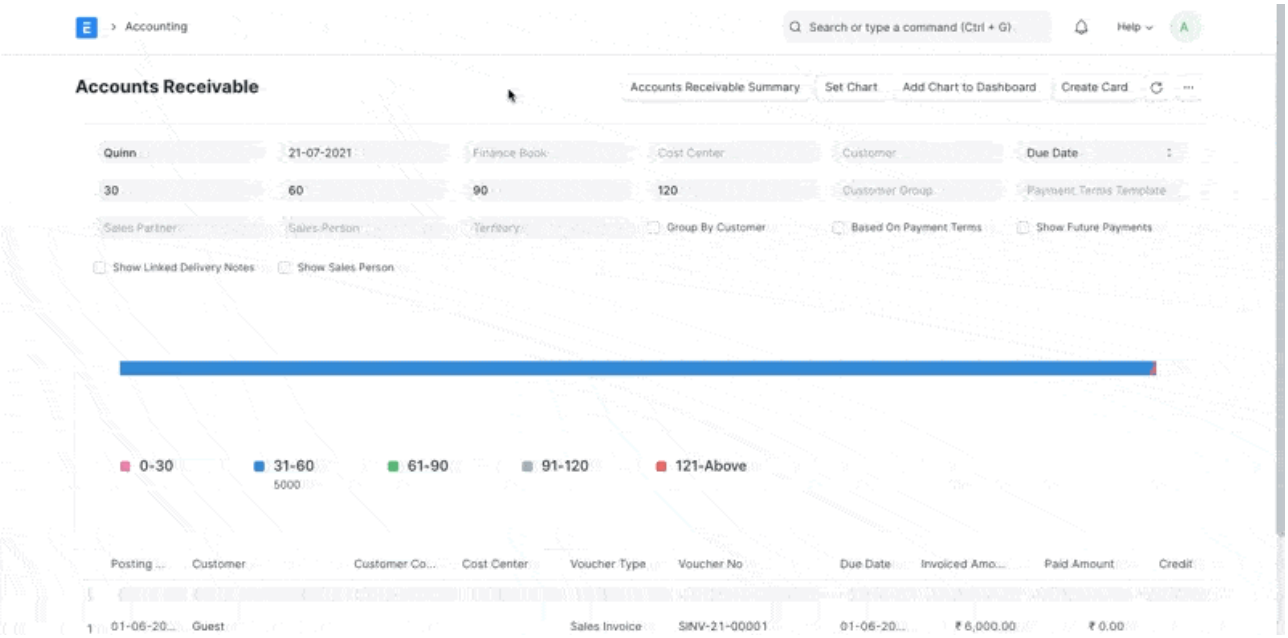
4. Now, as you can see in the Sales Invoice the User can only read the Item Rate field which will be fetched automatically from the Price List.



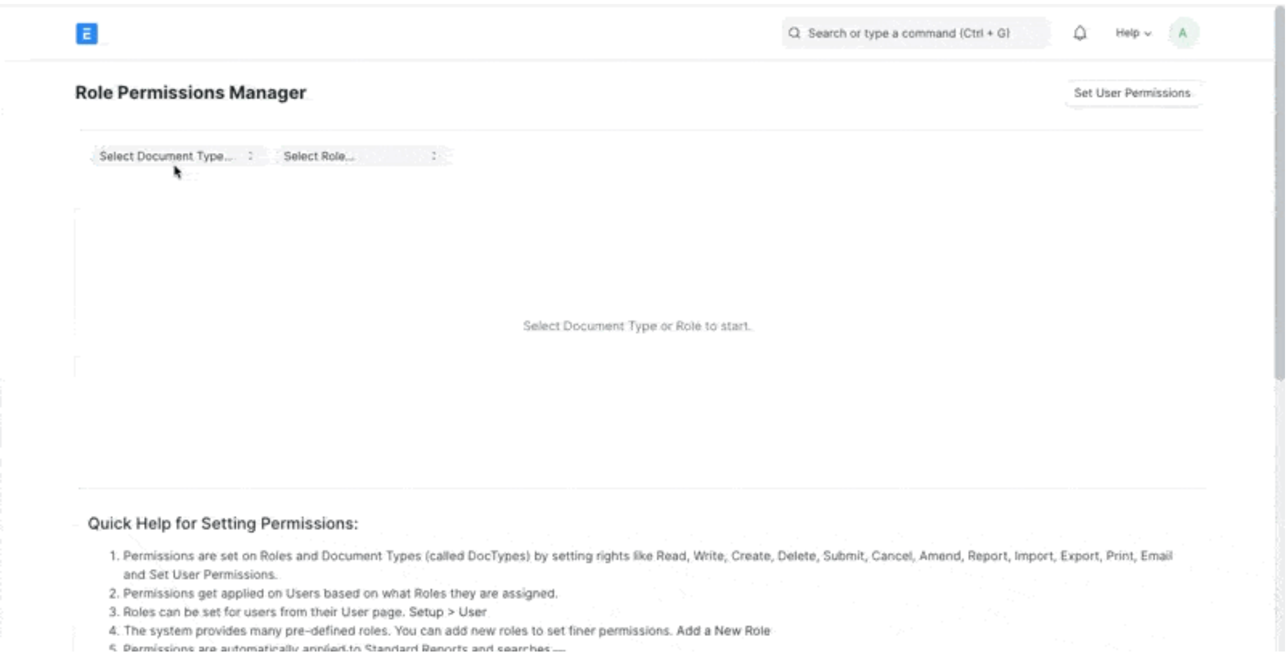
➢ Edit Export/Print permissions for reports

To handle Export/Print permissions for a report, use Role Permission Manager of the DocType the report is created from.

Step 1: Find out from which Document Type the Report is generated from



Step 2: Go to Role Permission Manager, filter using the same Document Type *(Sales Invoice in our example)* and edit the permissions based on Roles



ARTICLE-ADVANCED SETTING

➢ Setting Workflows on Masters

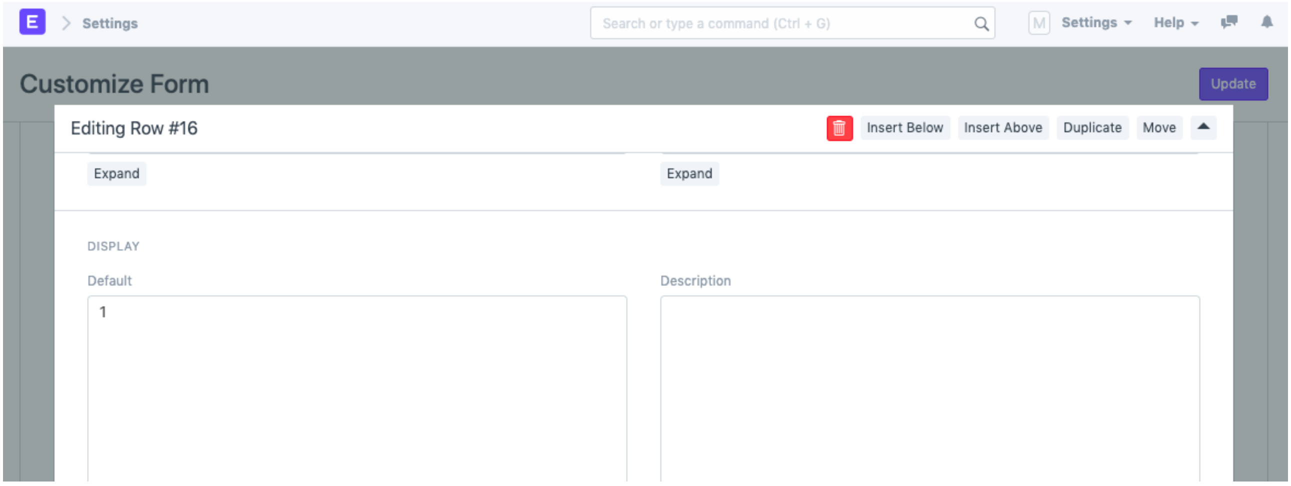
Workflows are usually set on submittable documents. Once the document is approved, it gets automatically submitted as per the workflow set. However, sometimes, businesses do have use cases where there is a need for approval of masters such as Items, Item Price, Pricing Rule, etc.

In ERP, these masters are non-submittable. Hence, even on rejection, sometimes, they are still active and you can use them in transactions. In this article, we have taken the example of the Item master. We will set a simple workflow on Item and make it active only when it has been approved. To do so, follow the below steps:

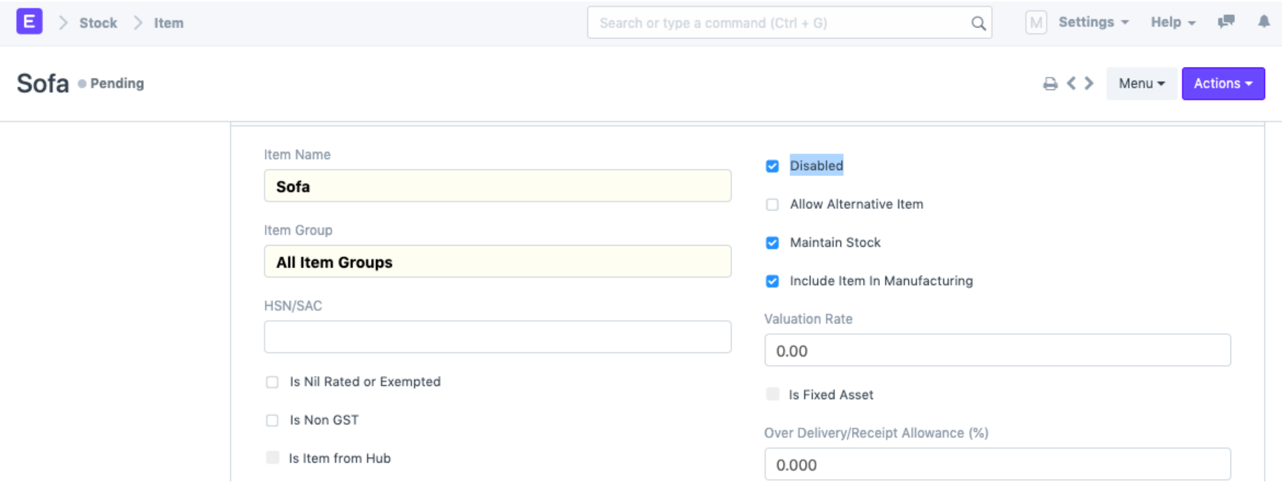
1) Make sure the master on which you are going to set the workflow has an Enable/Disable checkbox. If this is not present by default, you need to create one via Customize Form and set the default value as follows:

1. 0 if checkbox is "Disable"
2. 1 if checkbox is "Enable"

In our case, the Item master has a checkbox called "Disabled". We have set the default value as 1 in the Customize Form of the Item DocType as shown below.

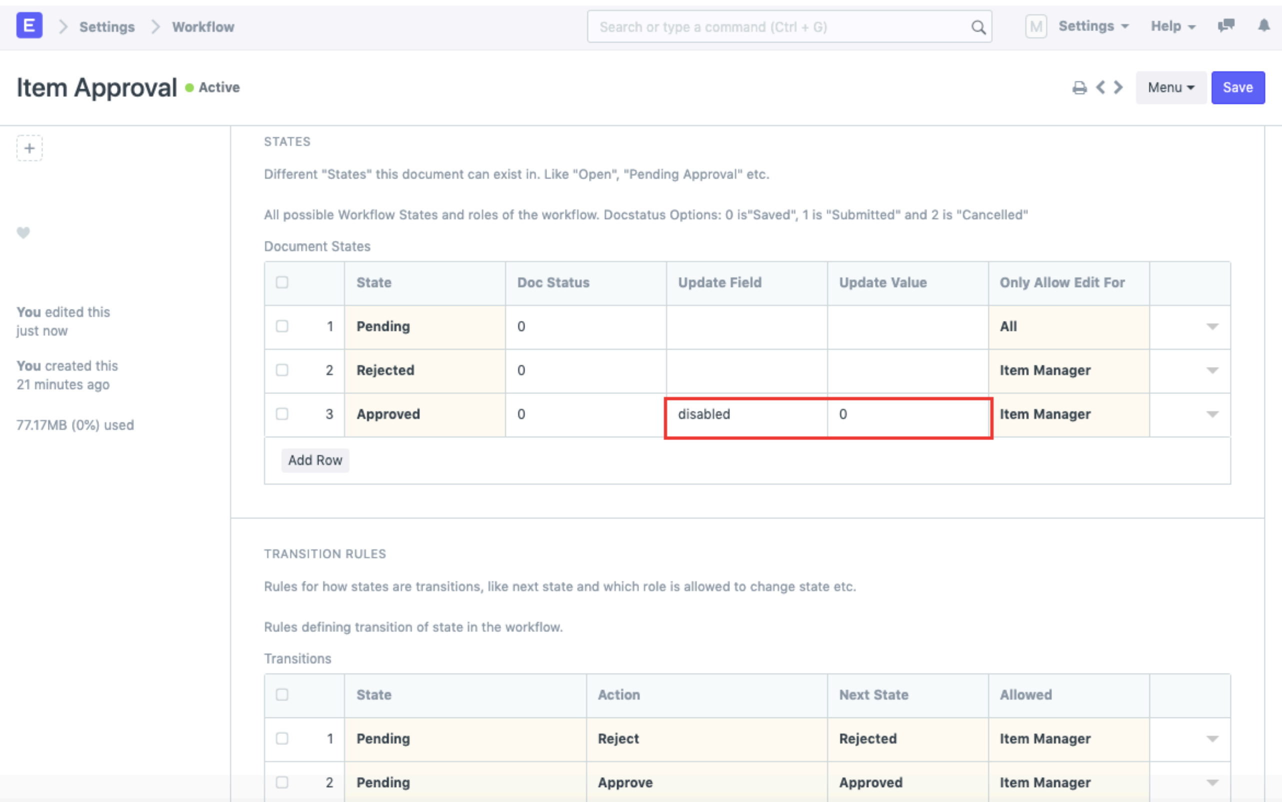


This means that every time a new Item is created, it will be disabled by default, unless approved (as seen in the screenshot below).



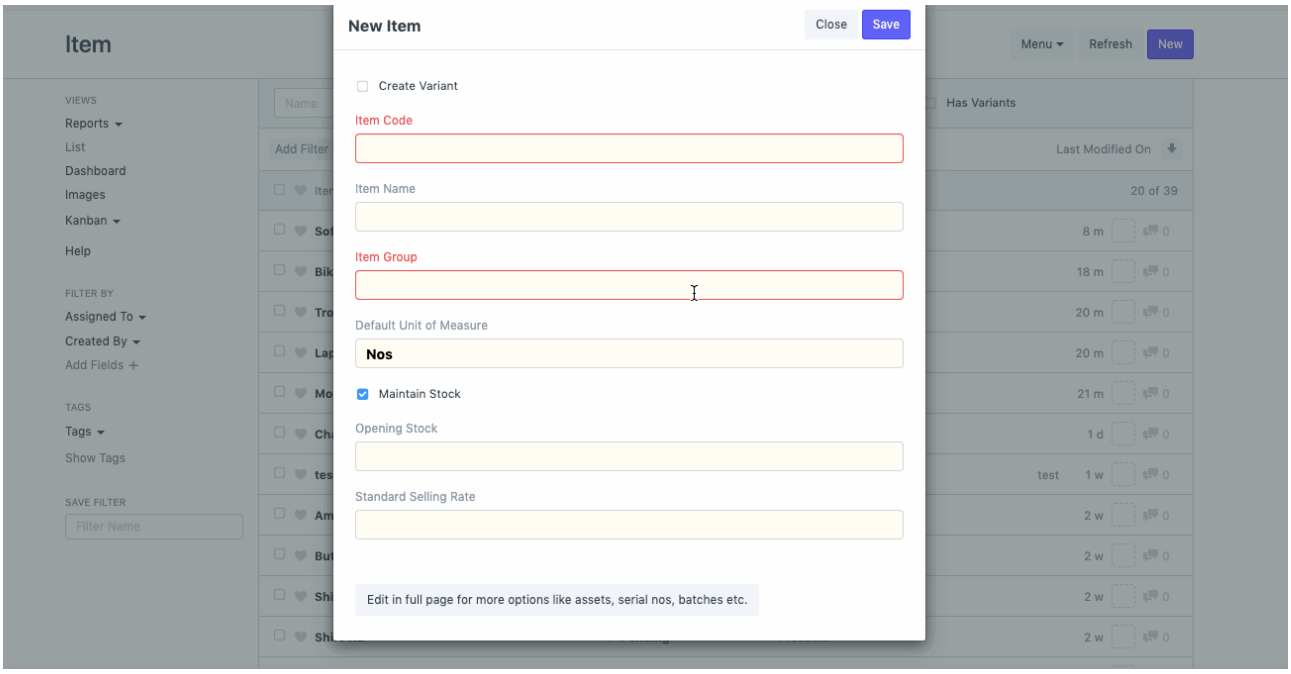
2) Next, set the Workflow.

In the States table, on approval, make sure to update the "Disabled" (or Enabled) checkbox to 0 (or 1 in case of enabled) as shown below.



This will ensure that whenever the Item is approved, the Item will automatically be enabled and you will be able to use it in transactions.

Check the below GIF to understand the workflow in detail:

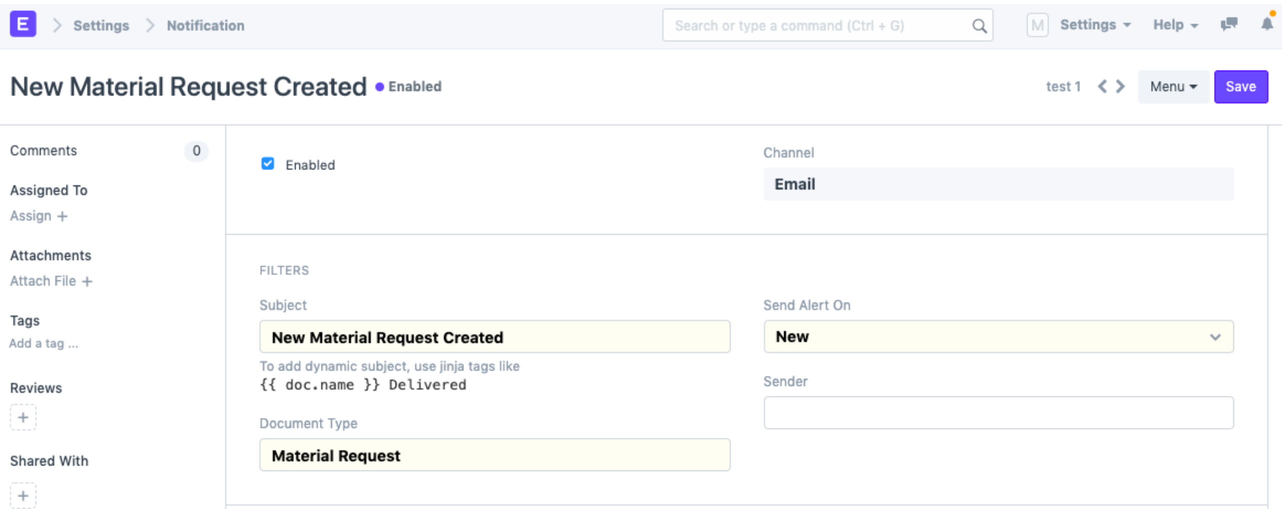


➢ Include Document Link in Notification Email

While sending an email notification in ERP, many a times, we need the document ID to be a part of the email message as a link. For example, if we have set a reminder (notification) for every new Material Request, then we would want the link of the new Material Request to be also sent in email to us. To set that up, following the below steps:

1) Go to Notification list, click on New.

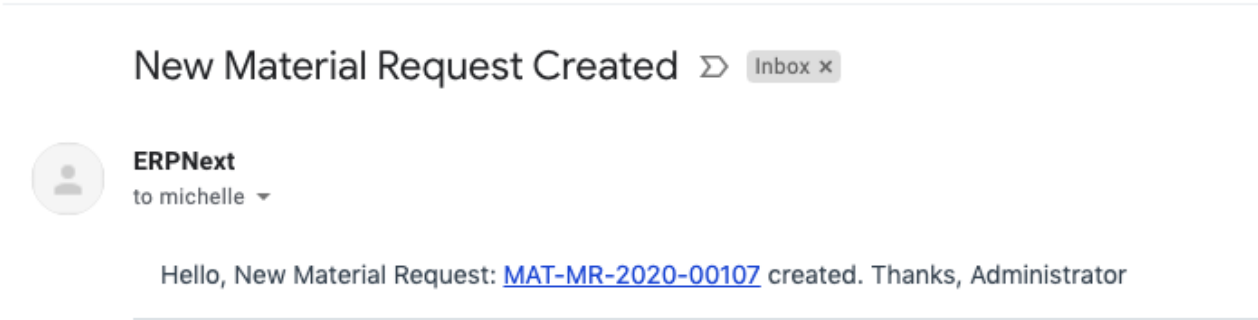
2) Create a new Notification for any DocType. In this case, we have taken an example of sending an Email Notification on creation of every new Material Request as shown below.



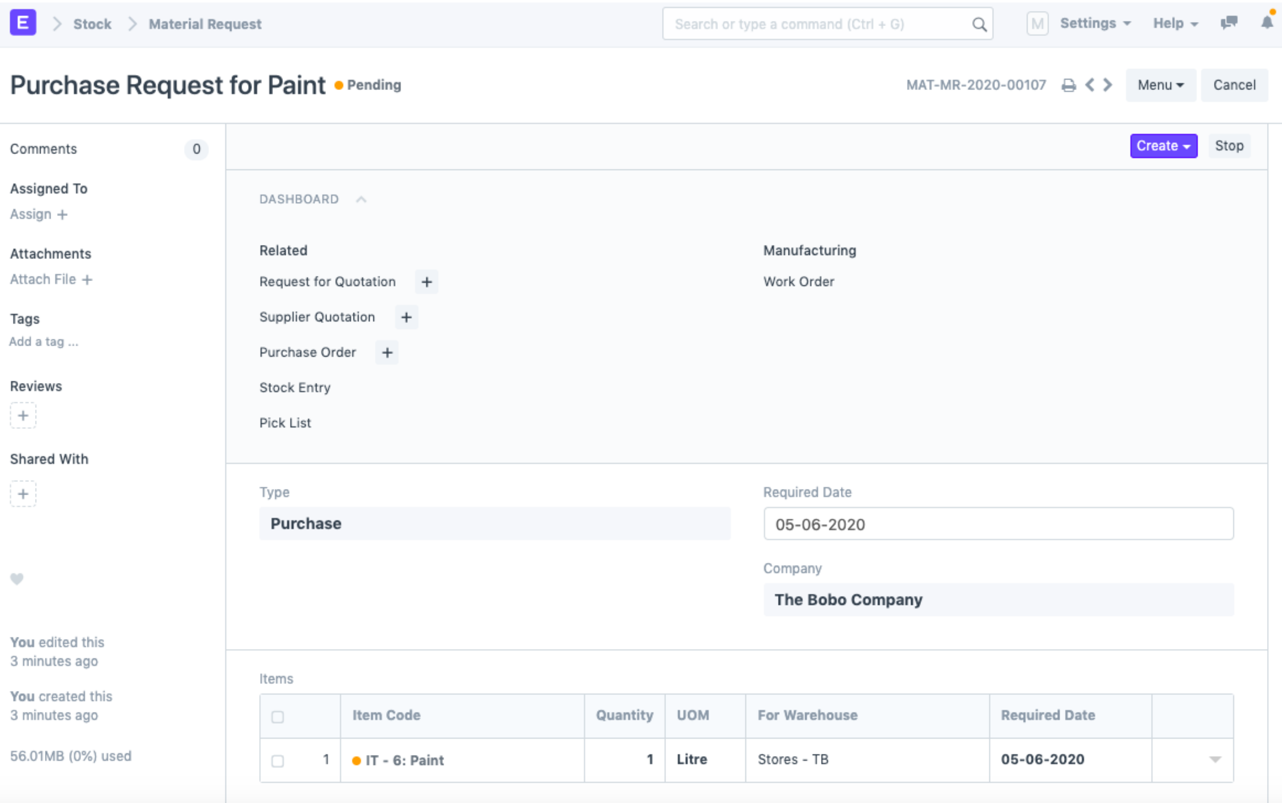
3) To send the document ID of the associated record as a link, copy the below snippet in the email message:

{{doc.name}}

4) Now on creation of a new Material Request, following email will be received because of the above set Notification.



On clicking the link, you will be taken to the new Material Request.

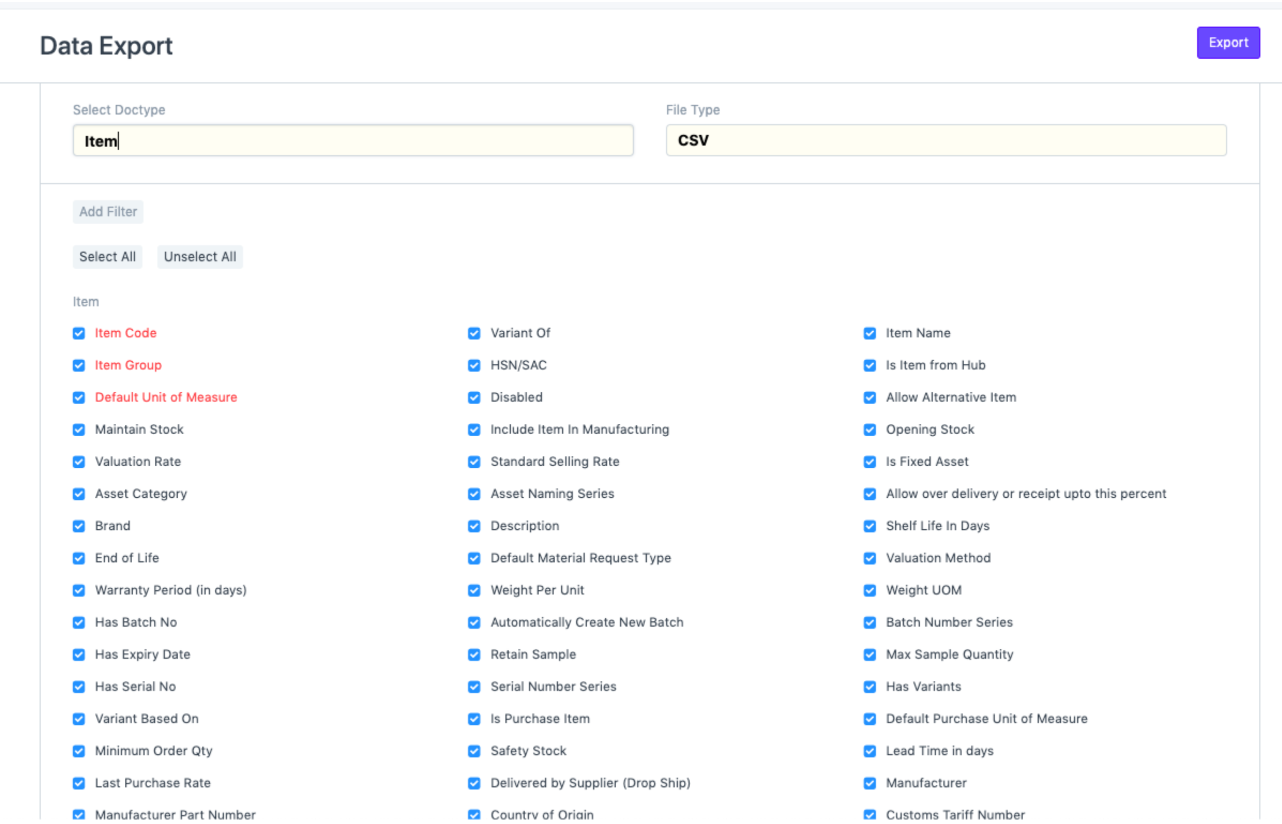


➢ Export Data in Excel/CSV

These are steps to export any data from a Doctype to Export/CSV format. Currently, you have to use Data Import for this:

1. Go to Data Export in your instance.

2. Select Document Type. Accounts for Chart of Accounts, Item, and so on along with the File Type (Excel/CSV).



3.Select the list of fields to be exported.

4.You can click on **Add Filter** to export data based on specific conditions.

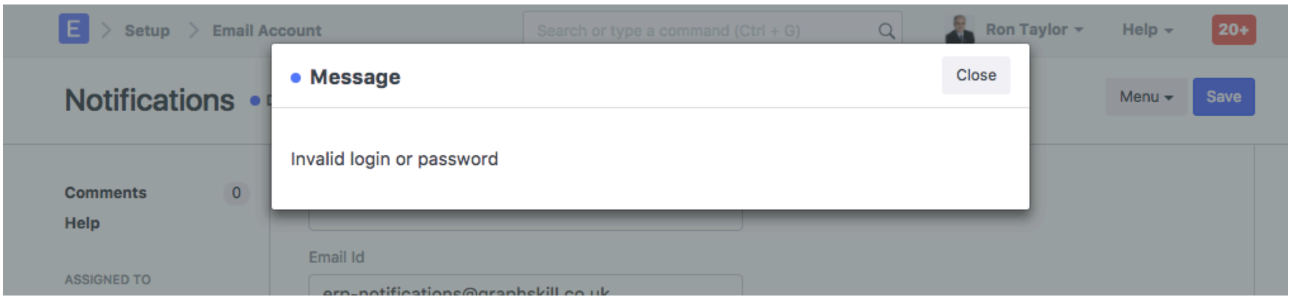
5.Once you are ready, click on the Export button.

This will export all your data in spreadsheets. You can open the file and check the same if it has the correct values (say accounts).

ARTICLES-ERRORS AND REPORTS

➢ Email Error in Sending or Receiving

In ERP, you can customize the Incoming and Outgoing Email Gateway. On saving an Email Account, ERP tries establishing a connection with your email gateway. If your ERP account is able to connect fine, then Email Account is saved successfully. If not, then you might receive an error as below.

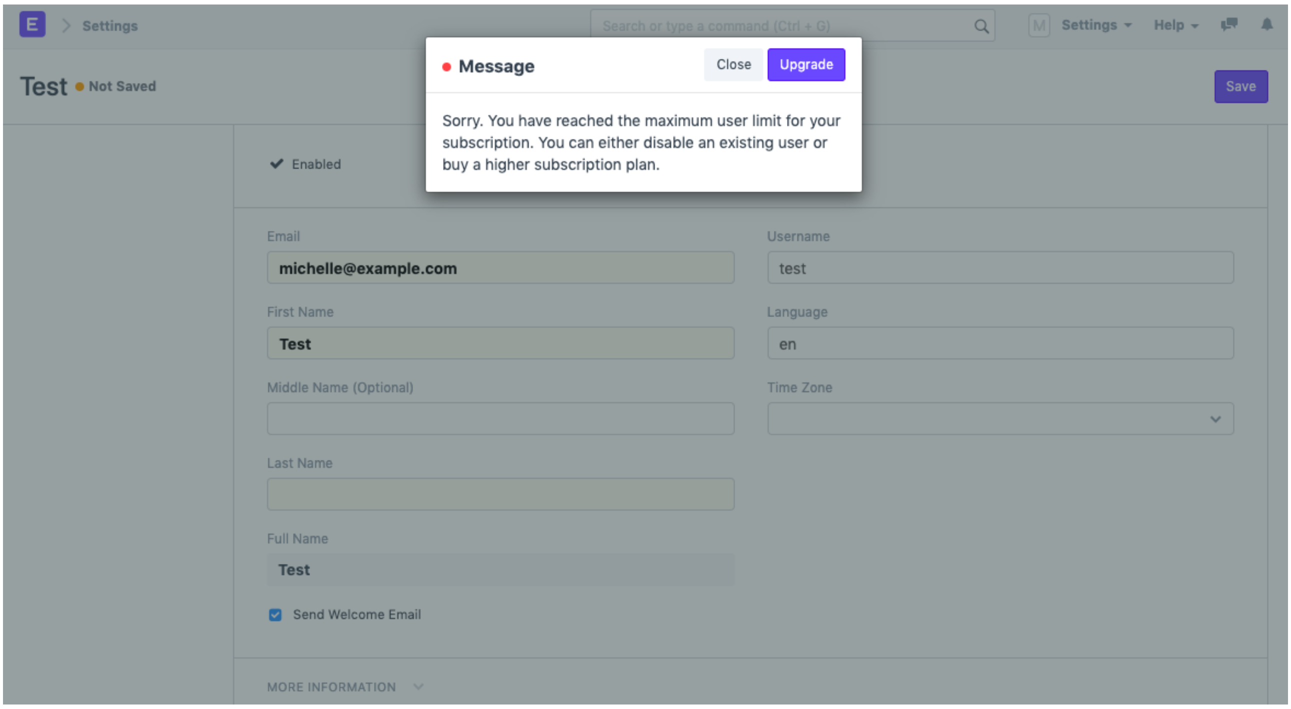


This indicates that using login credentials and other email gateway details provided in the Email Account, ERP is not able to connect to your email server. Please ensure that you have entered valid email credentials for your Email Gateway. Once you have configured Email Account successfully, you should be able to send and receive emails from your ERP account fine.

Note: Your ERP account is connected with an ERP email server by default. If you don't want to use your own email server, you can continue sending emails using ERP email server, without any configuration required in the Email Account.

➢ Maximum User Limit Issue

Your ERP subscription depends on the number of System Users you subscribe for. Once you cross that limit, the system will not let you create any further number of users. For example, you have subscribed for 10 users. If you already have already created 10 System Users in your account, the system wont let you create the 11th System User, and you will get the below message.



To fix this, you will either have to:

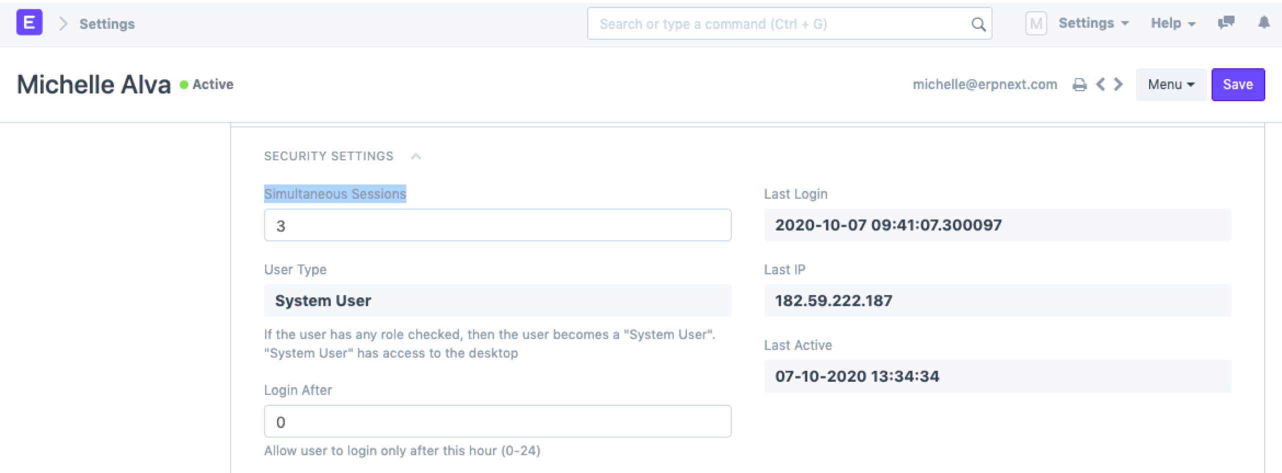
1) Buy new users or

2) Disable the current users

However, sometimes, you may still face this issue even when you have not exhausted the number of System Users as per your subscription plan. For example, you have a limit of 5 System Users and you have only created 3 users. Yet while creating the 4th user, you get the above message. The reason for this can be that for some of the uses, the field of "Simultaneous Sessions" is greater than 1.

Every simultaneous session is considered as 1 System User. For example, if you have created 3 users and one of them has "Simultaneous Session" set to 3, then you have a total of 5 users, i.e. 3 + 1 + 1 = 5 simultaneous sessions/system users.

To allow the system to let you create more users, you will have to reduce the simultaneous sessions of these users. To do so, go to the User's profile, under Security Settings, set/reduce the "Simultaneous Session" accordingly.



Note: You will still be able to create Website Users as there is no limit for the same.

➢ Import Error due to Workflow

When you import a document of a DocType which has a workflow, you shouldn't be able to set the workflow_state to a state except the first.

For example, your Workflow has 4 states: **Draft**, **Sent for Approval**, **Approved**, **Rejected**.

You prepare records to import using Data Import Tool, and you set the workflow_state of each record to **Approved**. The system will not allow this, because you are transitioning from the state **Draft** to **Approved** which is not a valid transition according to your workflow.

The solution is to disable the workflow, import your data and then enable the workflow again.

➢ Perm Level Error

While customizing rules in the Permission Manager, you might receive an error message saying:

For System Manager *(or any other role)* at level 2 *(or another level)* in Customer *(or any other document)* in row 8: Permission at level 0 must be set before higher levels are set.

Error message indicates problem is in the existing permission setting for this document.

For any role, before assigning permission at Perm Level 1 or 2 (and so on), permission at Perm Level 0 must be assigned. Error message says that System Manager has been assigned permission at Perm Level 1 and 2, but not at level 0. You should first correct the permission for System Manager's role by:

- Assigning permission to System Manager at level 0.

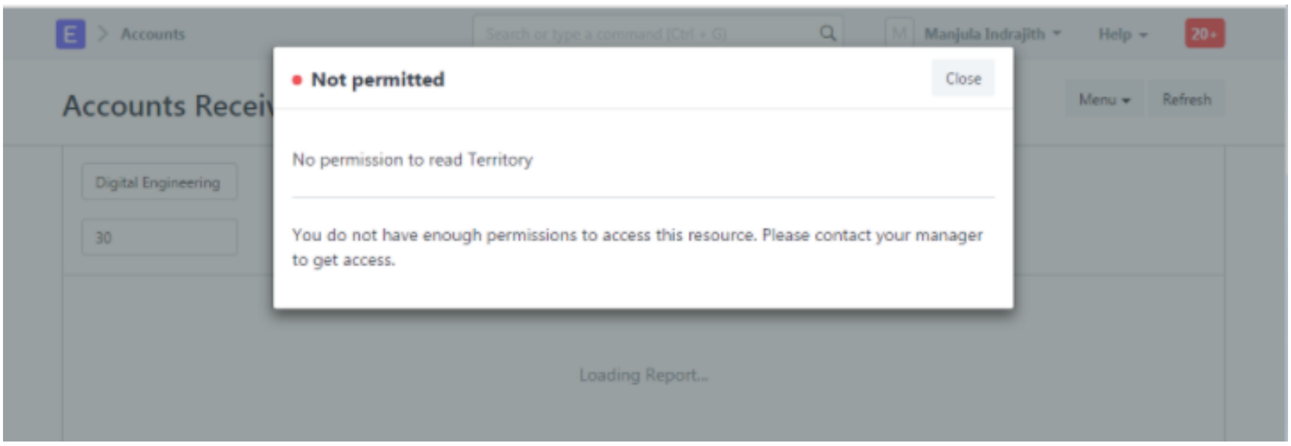
Or

- By removing permission at level 1 and 2.

After executing one of the above steps, you should be able to successfully add new permissions rules in the Role Permission Manager.

➢ Permission Error Problems

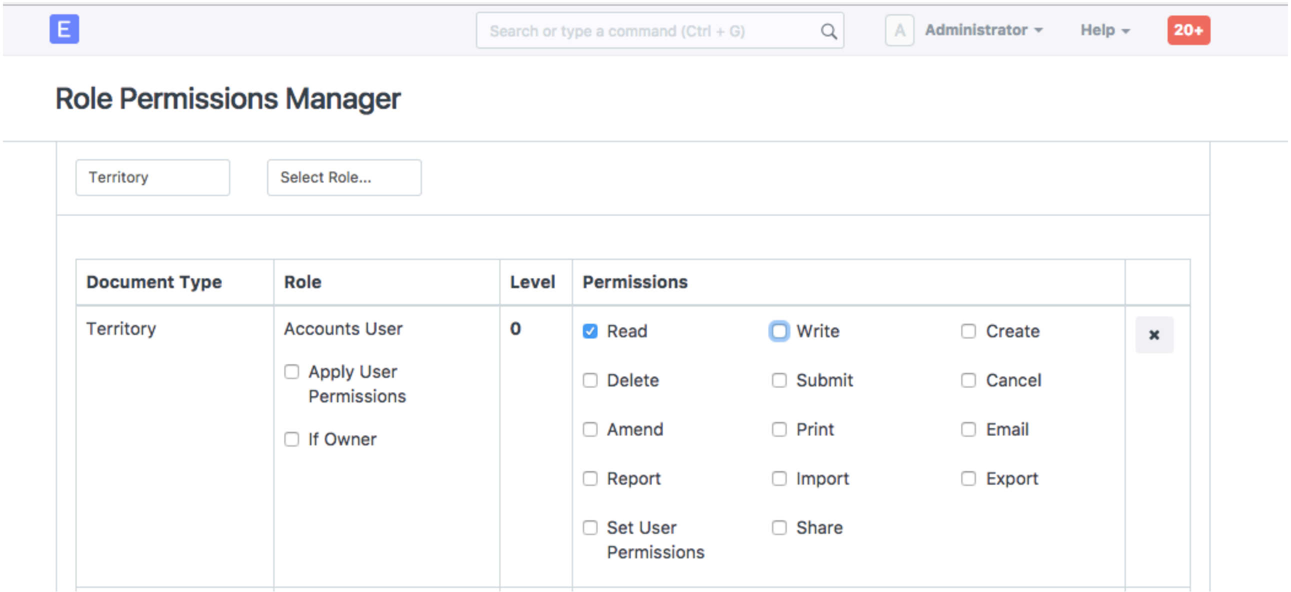
Question: User has roles like Account User and Account Manager assigned. Still, when accessing Account Receivable report, User is getting an error message of no permission the territory master.



Answer:

As per the permission system in ERP, for the User to be able to access a form or a report, s(he) should have at-least read permission on all the link field in that form/report. Since Territory is a link field in Account Receivable report, please add a permission rule to let Account User/Manager have at-least Read permission on the Territory master. Please follow below-given steps to resolve this issue.

1. Roles assigned to User are Account User and Account Manager.
2. As indicates in the Error message, the user didn't have permission on the territory master. As per the default permission, none of the above role assigned to that User has any permission on the Territory master.
3. To resolve this issue, I have assigned Account User permission to Read Territory master.



As per this permission update, User should be able to access Account Receivable report fine.

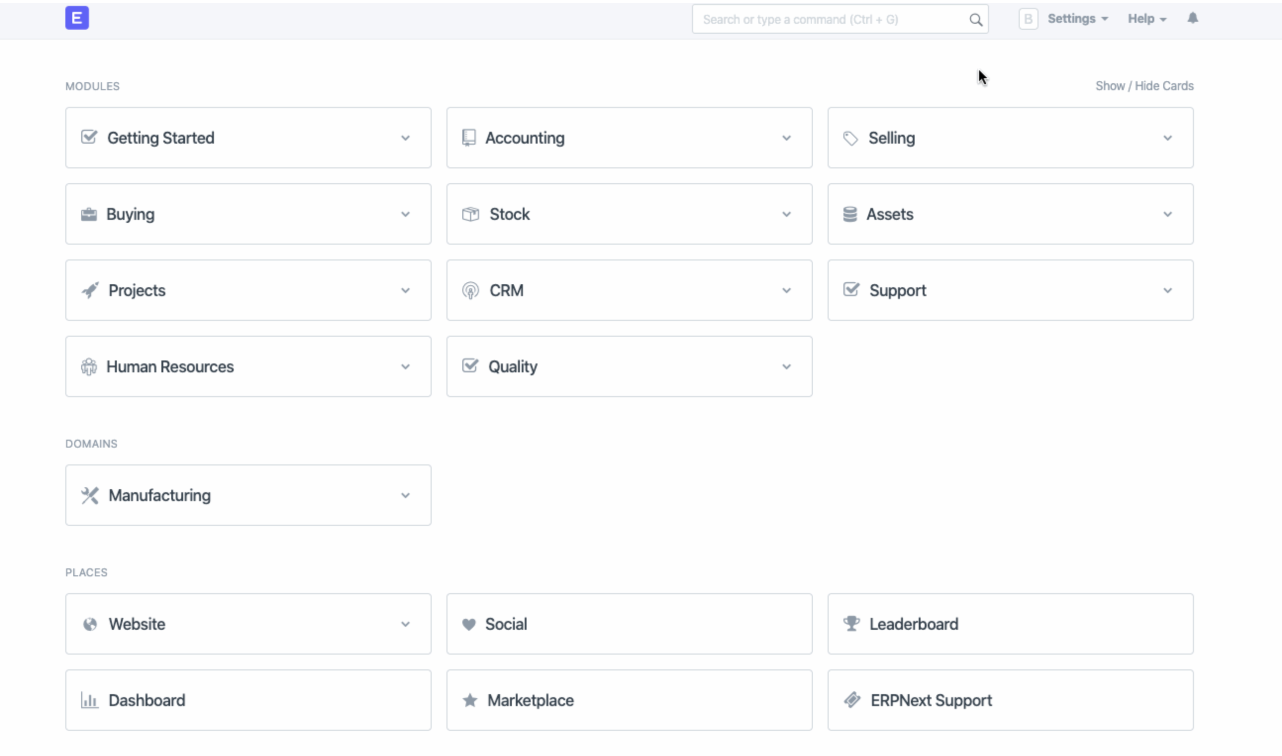
➢ Using Prepared Report

Many times when generating a report that deals with a large volume of data, say, a GL report for the entire year, you may end up getting the following error message: **Request Timed Out**. This occurs as there is a lot of data to be processed and presented on the report page, but not enough server resource hence resulting in a time out.

For better processing of such reports, ERP offers Prepared Reports (since v11). When a report is set as a Prepared Report, it is generated through a background job, and once ready, is available for users to view.

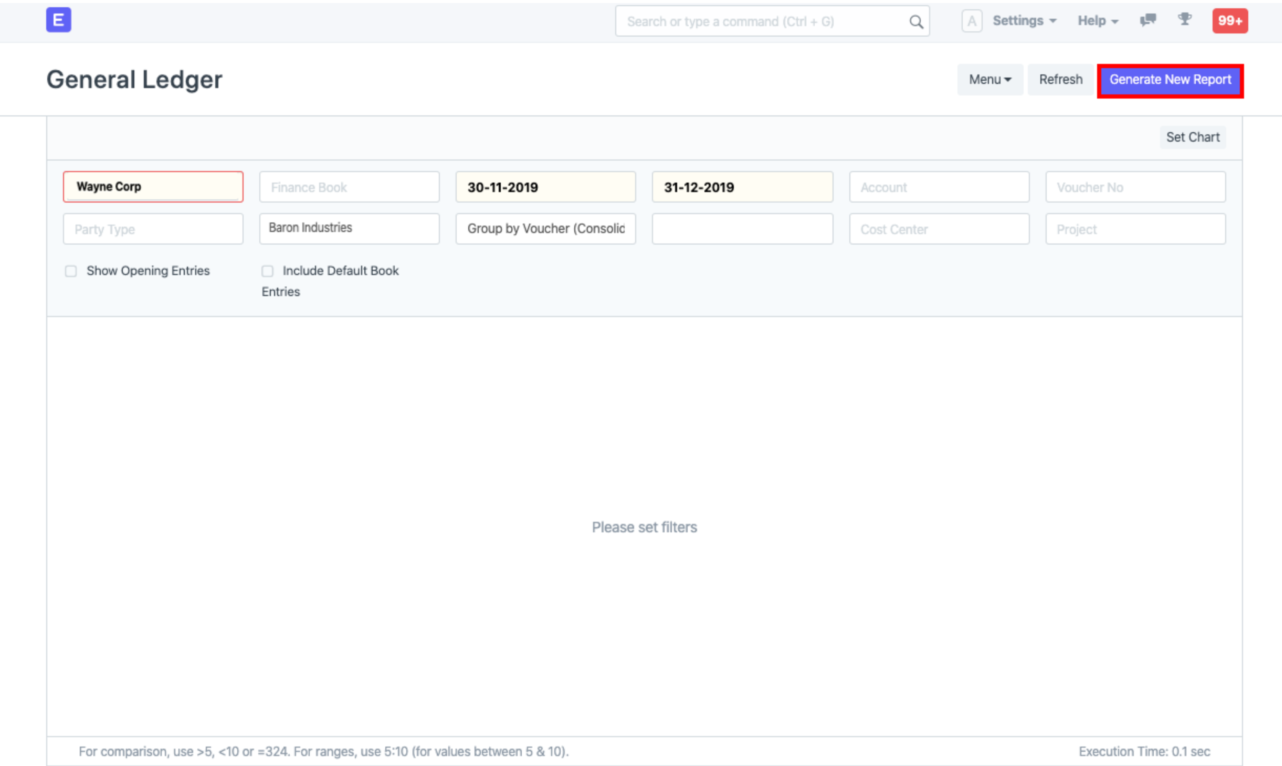
Steps to Set Up Prepared Reports

1. Go to Role Permission for Page and Report.
2. In the field 'Set Role For' select **Report**.
3. In the 'Report' field select the report for which you want to enable/disable prepared report.
4. Use the **Disable Prepared Report** checkbox to enable/disable the prepared report. If the option is checked, the prepared report option will be disabled for the selected report.
5. Click on **Update**.

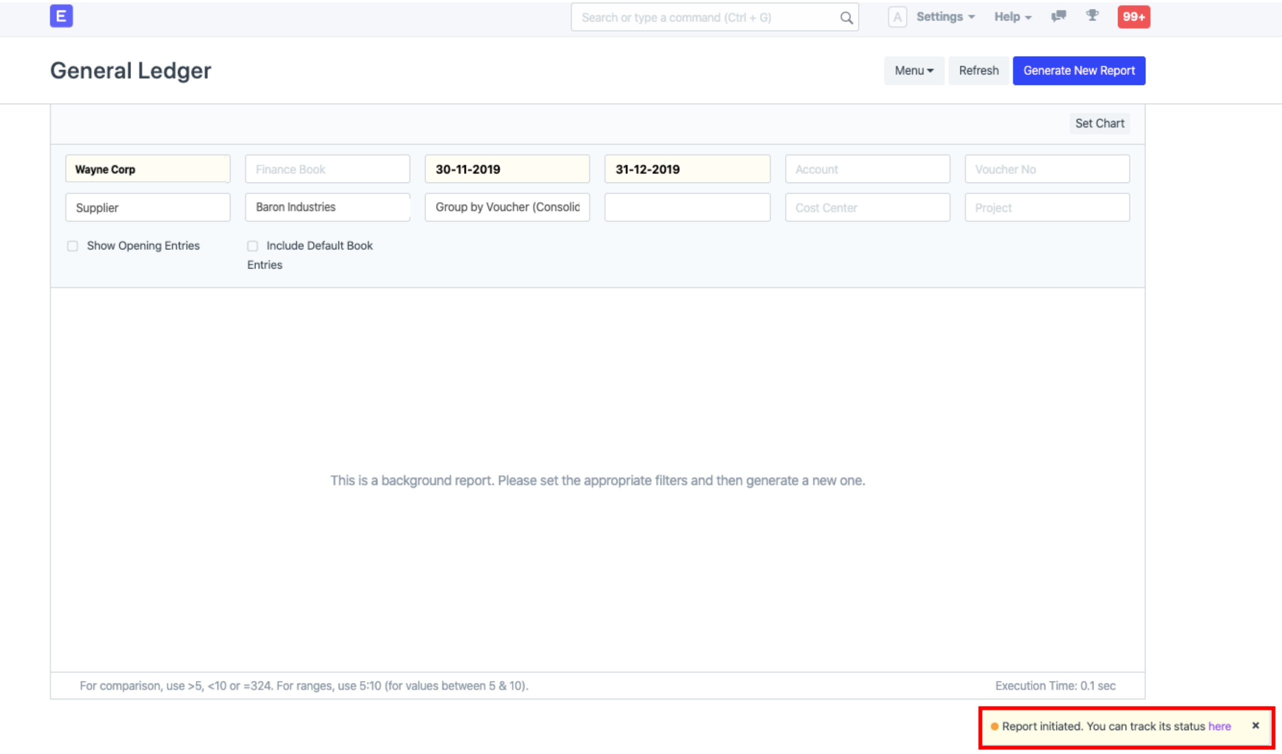


How To Use A Prepared Report

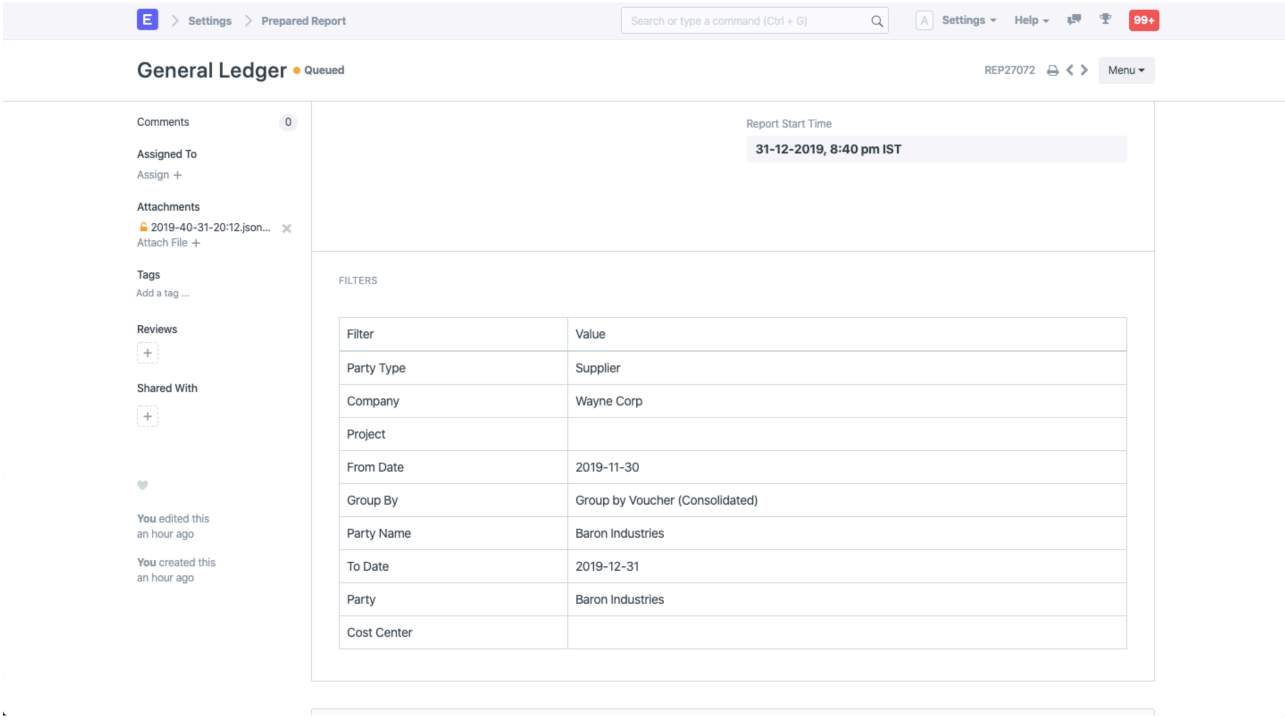
1. Open said report (say General Ledger) and apply all filters needed.
2. If the prepared report option is enabled for that report, you will see a **Generate Report** button. Click on the same.



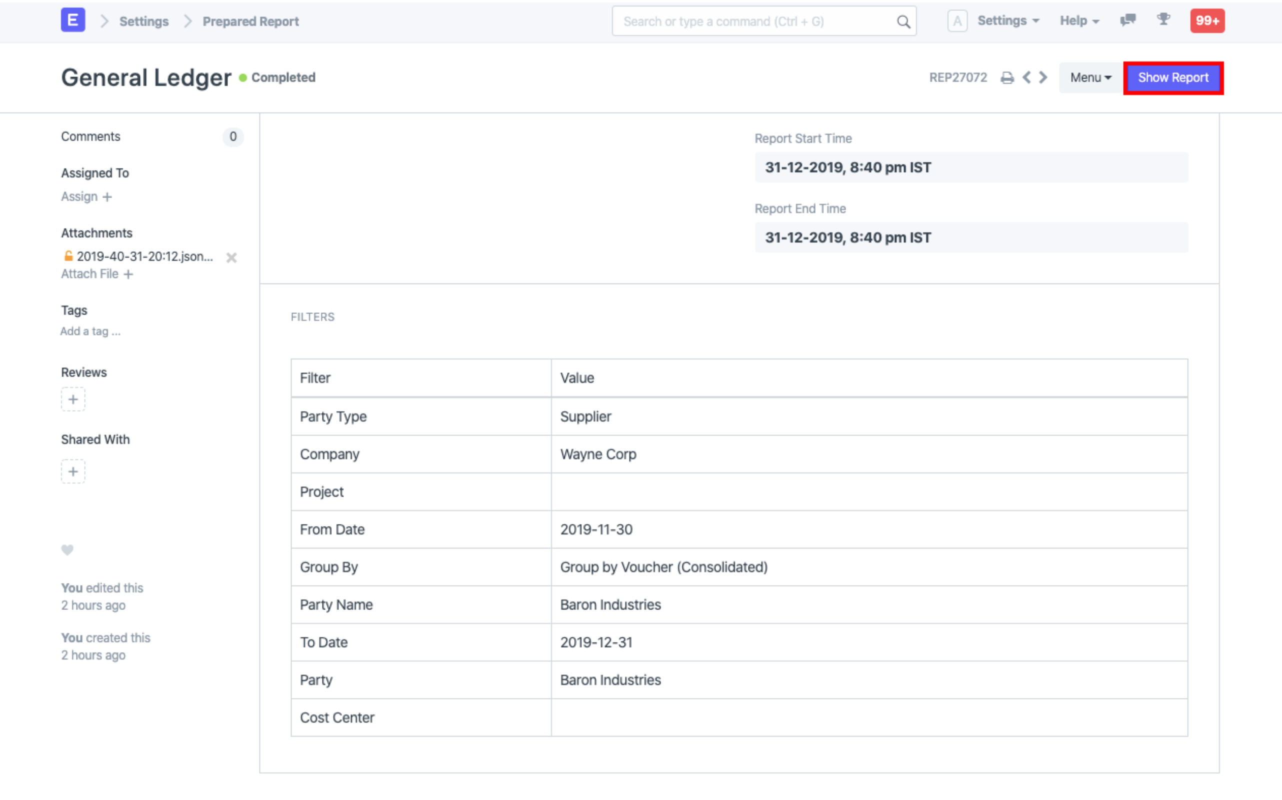
3. You will see a notification on the bottom-right of the screen saying "Report initiated. You can track its status *here*"



4. You can either wait on the said screen or click on *here* in the above message to open the page for the report. This will open a new page for the report:



As you see, the report page has status as "Queued". Once the report is ready, you will see a **Show Report** button which you can click to view the report:



5. Since Prepared Report is also a doctype, to view the list of Prepared Reports, you can use the Role Permission Manager to grant access to the same.

➢ What if Emails are not being received by the Recipients?

When an Email is sent, you assume that the Email will be received by the Recipient, but if you receive a feedback that they haven't received the Email, following are the steps to troubleshoot:

1) Sending an Email to an Email address that is misspelled or does not exist results in that Email not being delivered. While it seems obvious, it is easily overlooked and happens often.

2) The second thing you can do to check is to send an Email to yourself, this can be done via creating a New Communication.

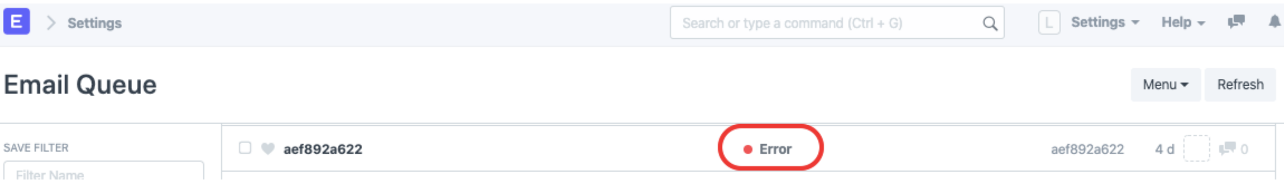
Go to Communication List > Click on New.

3) If the above method fails, kindly configure your Email Account again.

Go to Email Account > Open the Email to check > if as per you everything is correct, click on Save. It will throw an error if there is any issue with the Configuration and you can rectify it accordingly.

4) Check Email Queues for the unsent messages or errors if any.

If the state is Error(as in the screenshot below), you can find the error cause by opening that email and scroll down to Error field to know the error.



NOTE: The error can differ from what can be seen in the above screenshot.

END